Office of Financial Management

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SALARY PROJECTION SYSTEM (SPS)
USING SPS FOR SALARY PROJECTION
User Guide

January 2020

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About this Tutorial

TUTORIAL OBJECTIVE
This tutorial was developed to take budget staff through the most common sequential steps for developing a staffing projection using SPS and releasing data for CIM needs.

HOW TO USE THE TUTORIAL
This tutorial can be used in a formal training session, for individual practice, or developing the agency salary projection. Each task is preceded by a brief explanation of the task and its importance in your projection development as well as general business rules. Examples for data entry and selection are provided for use in formal training or individual practice—the highlighted information are suggestion values, it is best to use information pertaining to your individual agency. Alternatively, users can follow the steps without the use of the examples for true agency use. Specific business rules and recommendations for using SPS are denoted with a 📖 on the task. Appendix 1 contains a listing of all of these business rules.

ABOUT FEATURE LESSONS
Use of features will be described in great detail the first instance in the tutorial. Subsequent steps that utilize the same feature will be more generic drawing on the user's basic understanding of the feature already described. For example, the first time adding a position file, the instruction will describe every option and button available, whereas subsequent steps to add a position will only state, "add a position file".

SYSTEM ISSUES (BUGS) & RELEASE NOTES
There are some known issues (or problems) with SPS. Please see Appendix 3 for "Release Notes" describing these known issues.

ADDITIONAL RESOURCES
A rates reference document can be found in the BudgetWorks Help library at https://budgetlogon.ofm.wa.gov/library/default.htm. This Help library may also be accessed via the Help link in SPS. You can also contact the OFM Help Desk at HereToHelp@ofm.wa.gov or call 360.407.9100.

Getting Started – Logging on to SPS and System Navigation

Open Internet Explorer and enter the login address https://budgetlogon.ofm.wa.gov/Logon.aspx in the address bar of the browser.
If in a training session, use the link provided in class.

1.   Use your login ID and password to log into BudgetWorks. If you do not have a login ID and password, use the Security Request Form to request one.

2.   Login into BudgetWorks
        User ID – <Agency Number>00<First Name>
        Password – (provided in class or user chosen)

3.   Select Salary Projection System.

How to Disable Pop-Up Blockers
In order for the SPS application to work, you must disable your pop-up blocker for this site. The easiest way to do this if your security is set to block pop-ups, is to take the following actions when the message below appears as you try to work in the application:

Click on and the following choices will appear:
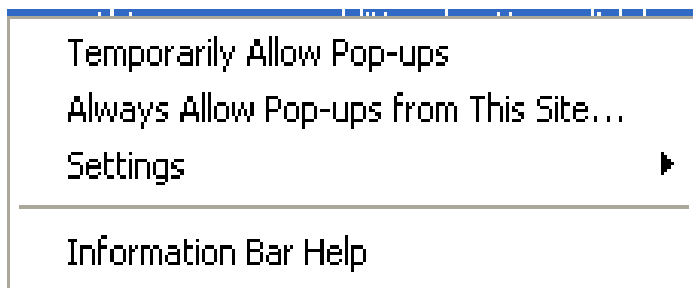
Choose "Always Allow Pop-ups from this Site…" This will put the site in your security settings automatically.

Or, while in Internet Explorer, select Tools, Pop-up Blocker, Pop-up Blocker Settings as seen below:
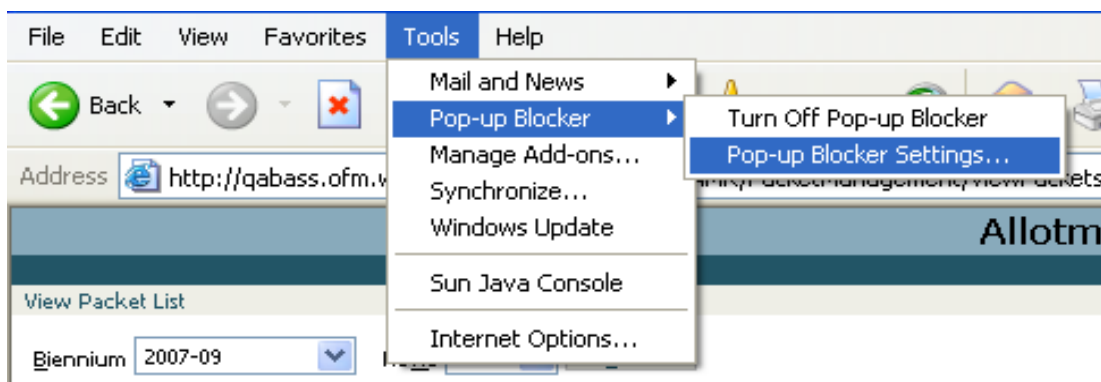
Under "Address of Web Site to allow:", type in ofm.wa.gov or fortress.wa.gov and select Add.

Pop-up Blocker Settings

Exceptions

Pop-ups are currently blocked. You can allow pop-ups from specific Web sites by adding the site to the list below.

Address of Web site to allow:

www.ofm.wa.gov   [Add]

Allowed sites:

[Remove]

[Remove All]

Notifications and Filter Level

☑ Play a sound when a pop-up is blocked.

☑ Show Information Bar when a pop-up is blocked.

Filter Level:

Medium: Block most automatic pop-ups

Pop-up Blocker FAQ   [Close]

Key Navigation Features

All navigation bars and selection tabs are in the same place on every page. The selection tabs run horizontally across the top of each screen, allowing for the selection of screen features and system navigation. Shortcut links on the application tab bar (3) and the breadcrumb bar (4) allow for the ability to "jump" to previously viewed pages without using the browser Back button (1).

1. **Internet browser navigation buttons.** 📖 *Note: The SPS application does not support the use of internet browser navigation buttons, i.e. 'back arrow' and 'forward arrow'. You shoul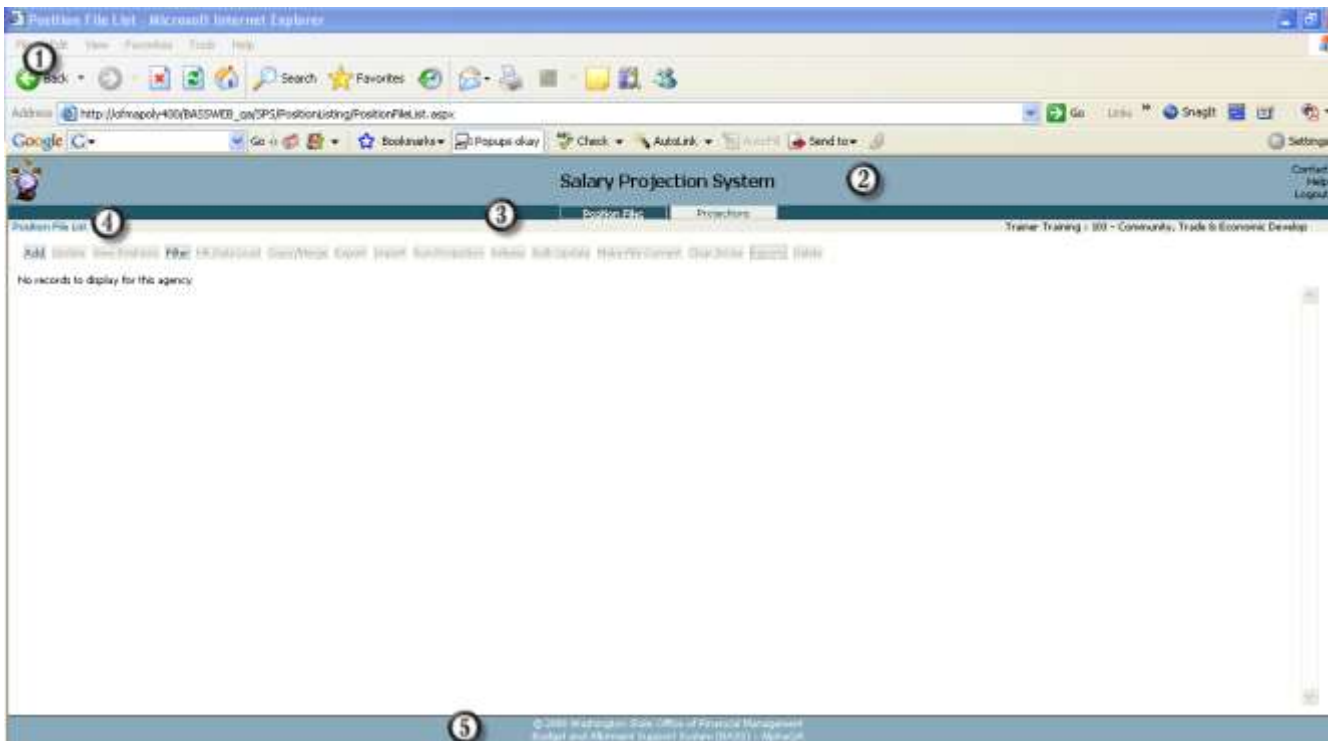d avoid using the back arrow and forward arrow buttons available on your web browser tool bar when working in SPS. Using these buttons will give unpredictable results depending on the screen you are on when used.*

2. **Page Header includes Application Title (Salary Projection System), Contact, Help, and Logout Link**. 📖 *Note: The Contact link tells how to contact support staff, and the Help link takes you to BudgetWorks Help document library.* 📖 *Note: It is extremely important to properly logout of the system when not in use. There is a timeout provision included in the system. If your session is inactive for 120 minutes the system will time you out.*

3. **Application Tab Bar** is always available, and includes a tab for each major functional area in the system including Position Files and Projections.

    - The **Position Files** tab enables you to view a list of the agency's position files, to navigate to all the detail related to a chosen file, and perform other functions related to position files. The other functions include adding new files, updating files, viewing details, new HR Data Loads, copying/merging files, exporting, importing, running projections, releasing files, bulk updating, making the position file current, clearing the in-use flag, running reports, and deleting files.

    - The **Projections** tab enables you to view a list of the agency's projection files, to update the projection file list information and run reports on those projection files.

4. **Breadcrumb Bar** serves as a trail to navigate back to any previously viewed screen in the application. The breadcrumb bar is dynamic in that any given page will show a different breadcrumb trail based on how the page was reached.

5. **Page Footer** indicates which application environment you are working in (i.e., training or production).

LESSON 1 - PREPARE POSITION FILE
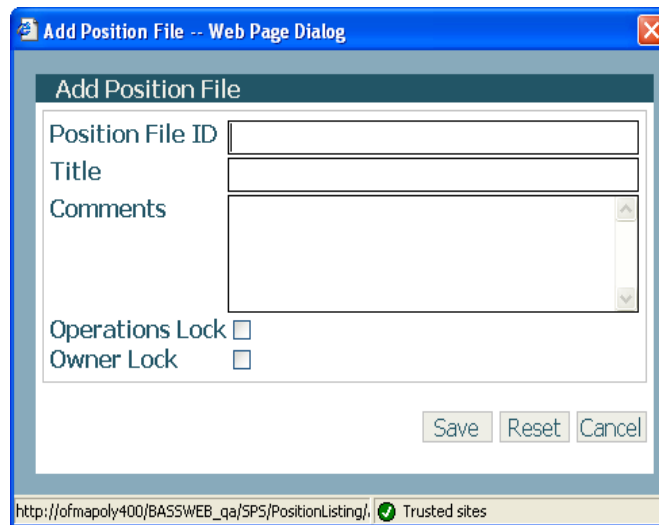
Lesson 1, Task 1 - Establish a Position File

All positions are contained within individual position files. A file must be added prior to performing an HR Data Load or Copy. Position files are assigned an owner with the default as the person who added the file.

---
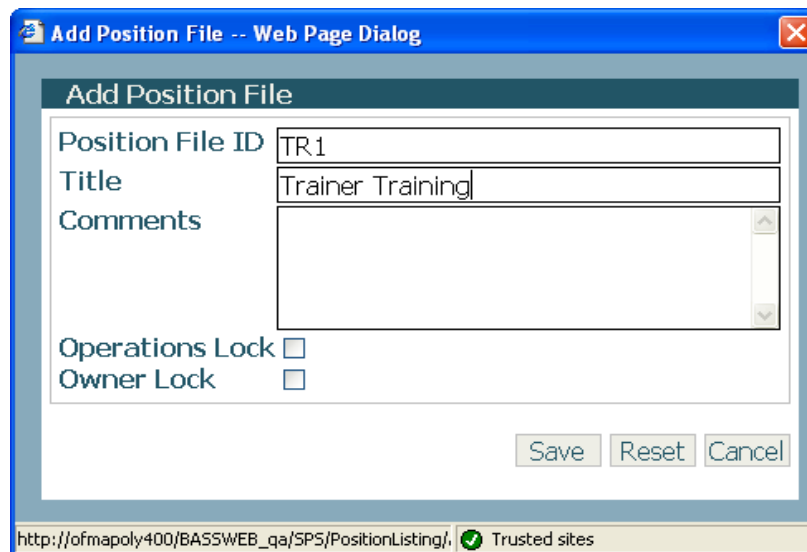
1.   After logging into SPS, the Position File List screen is displayed. 📖 *Note: If your agency does not have any position files previously established, there will be no records displayed in the Position File List for your agency.*

2.   Select the **Add** tab to create a new position file from the activities bar. The following Add Position File dialog box will be displayed:

3.   In the Add Position File dialog, add a three character **Position File ID** and **Title** for this file.
        <your initials>1 - <your name> Training
        TR1 – Trainer Training

4. Select **Save** to close the Add dialog box.

Lesson 1, Task 2 – View/Update Position File Information

The Position File List screen enables you to view information about your agency's position files as well as perform various tasks with those files. Informational items include number of records, number of exceptions, file owner, extract date, etc. Functions allow you (depending on your security level) to lock position files, enter file comments, change file owner, clear in-use flags, or delete unlocked position files. Each column can be sorted in ascending or descending order according to user preference.

1. **Activities Bar**—allows you to perform actions related to a specific position file or files or to Add a new position file. This includes Update, View Positions, Filter, HR Data Load, Copy/Merge, Export, Import, Run Projection, Release, Bulk Update, Make File Current, Clear InUse, Reports and Delete.
   - The Add tab allows you to create a new position file to load HR data into, add positions manually, or import data into.

- The Update tab allows you to update the position file title, comments, owner, funding titles biennium, operations lock, owner lock, and the export flag depending on your security.
- The View Positions tab allows you to look at position information for positions included in the position file chosen.
- The Filter tab allows you to set or clear the filter that you want to apply to the position file, reports and the projection.
- The HR Data Load tab allows you to extract HRMS data into an empty position file.
- The Copy/Merge tab allows you to copy position information from one file to another.
- The Export tab allows you to export funding or assignment pay (Washington State Patrol only) information for updating outside the system. *See Lesson 2, Task 6 and Appendix 4 for more information.*
- The Import tab allows you to import funding or assignment pay (Washington State Patrol only) information back into the file you exported it from. *See Lesson 2, Task 6 and Appendix 4 for more information.*
- The Run Projection tab allows you to run a projection on the position file chosen. *See Lesson 3, Task 1 for more information.*
- The Release tab allows you to release position file information for the Compensation Impact Model, Labor Relations Office request and to view the CIM Position Listing Report. *See Lesson 4, Task 2 for more information.*
- The Bulk Update tab allows you to update mass information on the position file at one time. *See Lesson 2, Task 5 for more information.*
- The Make File Current tab allows you to update your position file to reflect any increments or General Salary Increases that occurred between the salary update date of the position and the current date. *See Lesson 2, Task 5 for more information.*
- The Clear InUse tab allows budget operations users to clear the InUse flag in case a user has improperly logged out so the position file can be updated.
- The Reports tab allows you to run a position listing report for a position file chosen. *See Lesson 2, Task 7 for more information.*
- The Delete tab allows you to delete one or several position files.

2. **Position File Selection Box**—allows you to work with a particular position file or files.
3. **Position File ID**—displays the chosen three character ID.
4. **Position File Title**—displays the chosen title.
5. **Operations Lock**—displays a lock indicator if an operations user has locked the file. To remove this lock you must go through the update tab.
6. **Owner Lock**—displays a lock indicator if the owner has locked the file. To remove this lock you must go through the update tab.
7. **InUse Indicator**—displays the name of the person who has the file in use. Budget Operations users can clear this by selecting the Clear InUse tab.
8. **Exported Indicator**—displays whether a position file has been exported for funding or Assignment Pay (Washington State Patrol Only). To remove this indicator Budget Operations or the Owner can clear this through the update tab.
9. **Comments Indicator**—displays whether comments are associated with the position file. To view click on the check mark and to close click the check mark again. To change comments you must go through the update tab.
10. **Owner**—displays who owns the position file. This can be changed through the update tab.
11. **Record Count**—displays the total number of records in the position file both valid and invalid.
12. **Exception Count**—displays the total number of exception records (invalid records) that unless fixed will not be included in a projection.
13. **Funding Titles Biennium**—displays from which biennium the funding titles are edited against. This can be changed through the update tab.
14. **Extract Date**—displays the date the HR Data was loaded into the position file. If the file was copied, it will display the date of the original file.

15. **Updated By**—displays the name of the user that last updated the file and if you hover over the name will display the date and time it was updated.
16. **Released By**—displays the name of the user that released a position file to CIM and if you hover over the name will display the date and time it was released.

1. Select the **Update** tab to update a position file from the activities bar.

2. The following Update Position File dialog box will be displayed:

3. Enter **Comments** in the comments section for additional information for later use.
   "Complete agency data load on <today's date>"

4. Check the box to the right of **Operations Lock** to lock the position file. 📖 *Note: A Budget Operations Lock prohibits all agency Edit Access users from making changes to the position file. File Owners that are Edit Access may also set an Owner lock that will prohibit all Edit Access users who are not the file owner from making changes to a position file. No file that has a lock set can be deleted.*

5. Select **Save** to close the Update dialog box.

Lesson 1, Task 3 – Load Data from the HR Data Warehouse

SPS gets its payroll data from the Human Resource Management System (HRMS.) The HR Data Load will pull all position records contained within the HRMS data for the agency. This includes vacant positions and abolished positions that although not used by the agency, have not been removed from the HRMS personnel/position data. There is currently no option to limit the amount of data retrieved from the HRMS. Updated data is available to SPS after each payroll run (usually around the 10th and 25th.) Positions that do not meet certain rules or data requirements will be flagged as invalid and not included in any projections. More information on these invalid records is available in Lesson 2, Task 2 – Correct Invalid Positions and Appendix 2.

5. Check the **Position File Selection box**, and then select the **HR Data Load** tab from the activities bar.

6. The system will go out and load the HR Data information into your position file. 📖 *Note: You will know the data has been loaded by the record count and exception count stated on the position file list. Depending on the number of records, this may take a little bit of time. See below:*

Lesson 1, Task 4 – Copy Positions for One Program to its Own File (Including Filter)

Users can easily copy positions between position files in SPS. However, the position file to copy to must exist prior to the attempted copy. SPS was developed with a multi-purpose filter that can be used to limit the amount of data copied. If position data already exists in the Copy To file, merge options are available for the user to determine how they wish the system to handle the copy/merge.

1. Select the **Add** tab to create a new position file from the activities bar. Then add a new **Position File ID** and **Title**. 📖 *Note: A position file must exist for you to copy.*
   <your initials>2 – <your name> - Copy To File
   TR2 – Trainer - Copy To File

2. Select **Save** to close the Add Position File dialog box.

3. Hover over the **Filter** tab to set or clear a filter.

4. Select **Set Filter** and the following SPS Filter dialog box will be displayed, by default the Position tab is displayed first:

    Note: There are four tabs on the Filter each criteria field will display a tool tip with a formatting rule, if one applies. Some criteria fields have lookups available and others are only available to type in the criteria.

- o The Position tab allows you to filter by specific position detail information
- o The Account tab allows you to filter by specific account coding elements
- o The Summary tab displays summarized information on the number of records that will be affected by the filter chosen (when a specific position file is not chosen, this information will not be available)
- o The Hints tab displays some of the common rules used in setting a filter and when they can be used. An example for job class and Name are below:
  - *Job Class - **12*** (returns all job classes that begin with 12)*
  - *Job Class - **120?1** (returns all job classes where the first three-characters are 120 and the last character is 1 regardless of what the fourth-character is)*

- *Job Class - = (returns all job classes where the job class code is blank);*
- *Job Class - **12000-12040** (returns all job classes within the range of 12000-12040)*
- *Job Class - **12010, 12020, 12030** (returns all job classes matching 12010, 12020, or 12030*
- *Name - **> B** (returns all records where the name is greater than the letter "b". < and <> are also allowed)*
- *Name - **Ove*** (returns all records where the name as displayed begins with "ove". By default HR data loads Last Name, First Name.   The only option to search on name is to enter the first part of the name as displayed and enter * at the end. Spaces and commas are not allowed).*

    Note: The filter can search on a number of options (e.g., Program and Job Class) as long as the selections do not get too complex.

5.   Select the **Account** tab to filter on Program

6.   Select the ⋯ next to **Pgm. Info** to bring up a lookup list of agency programs.   *Note: Programs listed are programs found in the AFRS funding titles for the funding titles biennium chosen. If you choose to go to a lower level of detail, you must first select the 1ˢᵗ level of the hierarchy (ie Program) and it will then display the next level (ie Sub Program) and down through the hierarchical relationship.*

7. Double click to select a **Program** from the list on which you wish to base the copy and select **Ok** to close the Lookup dialog box.
   <The program in your agency that you are coded to>
   100 – Administration and Support Services

8. Select **Ok** to close the Filter dialog box.

9. Check the **Position File Selection box** for the first position file you created and select the **Copy/Merge** tab. The following Copy/Merge Position Files dialog box will be displayed:
   <your initials>1 - <your name> Training
   TR1 – Trainer Training
   📖 *Note: If a filter was applied prior to a copy/merge, the dialog box will display the filter chosen.*

Copy/Merge Position Files -- Web Page Dialog

Copy/Merge Position Files

Copy/Merge From

File ID   TR1 - Trainer Training

Filter   Program: 100

Copy/Merge To

File ID   [Select a Position File]

Please select a file.

Merge Options
○ Replace Duplicates   ○ Keep Duplicates   ○ Replace Entire File

Copy   Cancel

http://ofmapoly400/BASSWEB_qa/SPS/PositionListing/CopyM   ✅ Trusted sites

10.   In the Copy/Merge To section of the dialog box select the [image] to choose the second file you added then select **Copy**. ☐ *Note: If the file in the Copy/Merge To section is empty, only the copy button will be available, if the file in the Copy/Merge To section has records, the Merge Options will be enabled and the copy button will display as Merge. ☐ Note: There are three Merge Options 1) Replace Duplicates overwrites any duplicates found in the To file, 2) Keep Duplicates retains any duplicates found in the To file, ignores those in the From file, and 3) Replace Entire File takes all the information from the From file and puts it in the To file. ☐ Note: Duplicate means the same position number, person name and start date.*
<your initials>2 – <your name> - Copy To File
TR2 – Trainer-Copy To File

11.   Verify the number of positions you expected to copy are displayed in the record counts on the Position File List screen.

LESSON 2 – EDIT POSITION FILE

Lesson 2, Task 1 – View Positions in Position Listing (Includes Filter)

> SPS allows users to see a listing of positions for any position file.   By default, any records that have been flagged as invalid (or exceptions) will be presented to the user when loading a list of positions unless no exceptions exist. The SPS Filter can be used on the position listing to limit the number of records displayed. The list can be seen in Rows of 100, 200 or 300 which may determine the number of pages you will have to page through to see all positions.

1.   To view the position listing you can either select the **Position File Selection box** and the **View Positions** tab or select the **Title link** of the file.

2.   Select a file from the position file list using either method described above.   This will take you to the position list screen shown below:
       <your initials>2 – <your name> - Copy To File
       TR2 – Trainer-Copy To File
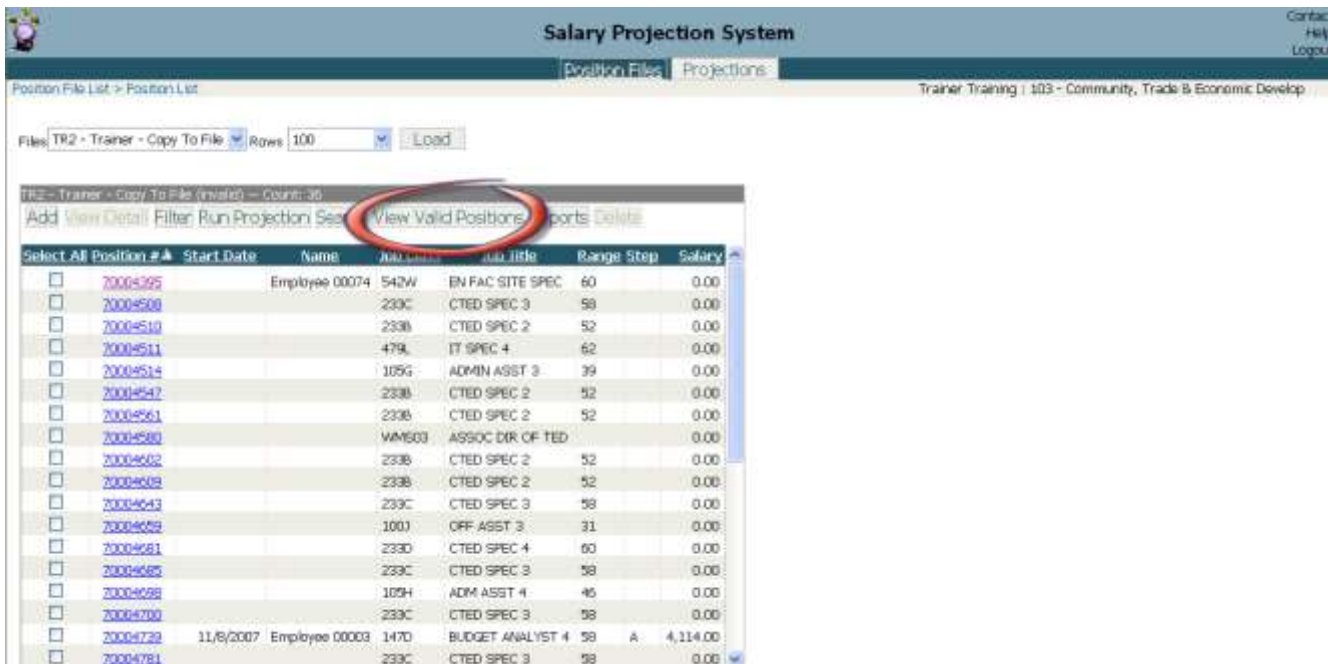
1.   Files selection box—allows you to select a position file you want to view as a position list.
2.   Rows selection—allows you to select the number of rows to display (100, 200, 300) on the position list.
3.   Load button—once the Files and Rows are selected, the load button must be selected to display the information that file.

4. Status Bar—indicates the position file listed by position file ID and title, whether you are looking at valid or invalid records, the count or number of records and whether the file is locked, read only, has a filter applied, etc.
5. Activities bar—allows you to perform actions related to a specific position file list. This includes Add, View Detail, Filter, Run Projection, Search, View (In)Valid Positions, Reports, and Delete.
    - Add—allows you to create a new position.
    - View Detail—allows you to navigate to the position details of the selected position.
    - Filter—allows you to set or clear the filter that you want to apply to the position file list.
    - Run Projection—allows you to run a projection on the position file chosen. *See Lesson 3, Task 1 for more information.*
    - Search—allows you to find a position by position number or name and navigate to that position's detail information.
    - View (In)Valid Positions—allows you to toggle between invalid and valid positions on the list.
    - Reports—allows you to run a position listing report.
    - Delete—allows you to delete one or several positions from the position file.
6. Selection Boxes—allows you to choose header and select all or deselect all.
7. Position #—Displays the number identifying the position.
8. Start Date—Displays the date the position is effective.
9. Name—Displays the name of the person holding the position.
10. Job Class—Displays the job class for the position.
11. Job Title—Displays the working title for the position.
12. Range—Displays the range for a classified position.
13. Step—Displays the step for a classified position.
14. Salary—Displays the salary for the position.

3. Select **View Valid Positions** to change the display to valid records.

4. Review Valid Positions and note a job class number that has more than one position and write it down for reference in the next lesson.
    _____

5.   Select **Filter/Set Filter** and select the **Position** tab. Enter the **Job Class** code noted above in the Job Class field.
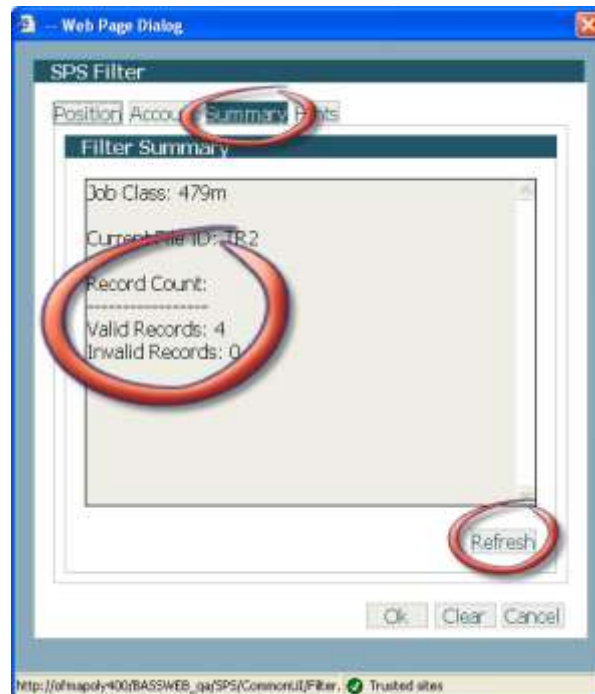
6.   Next, go to the **Summary** tab and select the **Refresh** button to see how many records your filter will return.

7.   Select **Ok** to apply the filter and return to the Position Listing. 📖 *Note: This may return an empty list for invalid or valid positions.* 📖 *Note: You can filter on any combination of account code or available position options (i.e., all Secretary Admin with a position start date greater than 7/1/2003 in program 010 with appropriation index 011).*

8. Return to the Position file list by selecting the breadcrumb **Position File List**. Then choose the Position File that you originally loaded HR data into and load its position list by using the **title hyperlink** or the **Position File Selection box** and **View Positions** tab.
<mark><your initials>1 - <your name> Training</mark>
<mark>TR1 – Trainer Training</mark>

9. Clear the filter and select **View Valid Positions**.

10. Click on the header of the **Job Class** column to sort the list by job class. This sort option is available for all columns of the Position List.

<div align="center">

Lesson 2, Task 2 – Correct Invalid Positions

</div>

> Position records that do not meet certain business or data rules get flagged as invalid records. By default the position list displays any invalid records found. Within the Position Detail of each record is an explanation of the error that resulted in the flag. Appendix 2 of this document contains a listing of possible errors and recommended resolutions. All vacant positions will come across as an invalid position since information vital to calculating a projection is missing. Invalid positions will not be included in any projections. It is necessary to correct all errors for positions that are needed to adequately represent projection results.

1. Load the **Position File** that you copied filtered data into in Lesson 1, Task 4.
<mark><your initials>2 – <your name> - Copy To File</mark>
<mark>TR2 – Trainer-Copy To File</mark>

2. Verify in the status bar that you are viewing invalid records. Toggle the **View (In)valid Positions** tab as necessary to display **Invalid Positions**.

<div align="center">

Update a Vacant Position to Clear Invalid & Project Salary

</div>

3. To View the position detail select the **Position # hyperlink** or the **Position File Selection box** and **View Detail** tab.

4. Identify a position that is currently vacant that should be retained for projection purposes.
   📖 *Note: Vacant positions are always loaded as exception records since certain data elements are missing.*
   <mark>Pick the first classified position (position with a salary range) with a blank Start Date</mark> and blank name
   This will take you to the Position Details screen shown below:

1. **Activities bar**—allows you to perform actions related to a specific position detail. This includes Save, Reset, Add, Run Projection, Search, Delete, and View (Hide) Invalid Data Comments.
   - Save—allows you to save any changes you made to the record on the active Start Date tab.
   - Reset—allows you to discard any changes you made before saving and put the record back to its original state.
   - Add—allows you to create a new position or record in three ways:
     o Add Position presents a blank detail screen to create all information from scratch.

- o Copy to New Effective Date adds a new start date tab capturing all the information from the active Start Date tab you were on allowing you to make changes where necessary for a given position.
- o Copy to New Position presents a new start date tab capturing all the information except position number and name from the active Start Date tab you were on allowing you to make changes where necessary to the new position.
- Run Projection—allows you to run a projection on the position file chosen. *See Lesson 3, Task 1 for more information.*
- Search—allows you to find a position by position number or name and navigate to that position's detail information.
- Delete—allows you to delete the entire position or a selected Start Date (effective date) tab from the position file.
- View (Hide) Invalid Data comments—allows you to toggle between seeing or hiding the original invalid data comments that made the position invalid.

2. **Position Number**—the number assigned to the position.
3. **Name**—name of the individual tied to the position in HRMS.
4. **Start Date tab**—date the position detail information will start or started (is effective).
5. **Start Date (new)**—date the position detail information will start or started (is effective). This is available when creating new start dates.
6. **Pay Scale**—is made up of the pay scale type and area. For example 0001 represents 00 (Non-Represented) 01 (Standard Progression); 0101 represents 01 (WSFE) 01 Standard Progression.
7. **Job Class**—allows you to select a job class and job class description.
8. **Working Title**—allows you to add a position description. You can choose to use the job class description or add a one that fits agency needs for this position. This will display on the position listing and position listing report in the job class title. 📖 *Note: The Working Title will not automatically update when you select a job class and must be added or updated manually.*
9. **Range**—displays the range associated with the pay scale/job class combination.
10. **Step**—displays the steps associated with the selected range
11. **Special Pay Flag**—allows you to flag position as special pay (typically 2 ranges higher than the regular range). If a salary matches a special pay range for a given job class upon the HR Data Load, the system will automatically flag the position as special pay.
12. **Salary May Exceed Band Flag**—allows you to flag positions outside of the WMS/EMS band. If the salary is beyond the band limit upon an HR Data Load, the system will automatically flag the position as salary may exceed band.
13. **Y-Rated Flag**—allows you to flag a position as y-rated and overwrite the salary from the salary schedule. If a position is Y-rated in HRMS, the system will automatically flag the position as y-rated. Y-rated positions do not received periodic increases or General Salary Increases in the projection.
14. **Current Salary**—displays the salary associated with the pay scale, job class, range and step per the state salary schedule for classified positions. For all other positions you can enter the appropriate salary for the position.
15. **Rate**—allows you to display the salary unit of pay (daily, hourly, or monthly)
16. **Bargaining Unit**—allows you to select the code and title of the bargaining unit(s) available for your agency.
17. **Personnel Area**—allows you to select the code and title of the personnel area(s) available for your agency.
18. **Work County**—allows you to select the work county.
19. **Retirement**—allows you to select the code and title of the retirement plan.
20. **Increment Date**—allows you to enter a periodic increment date or review date. 📖 *Note: Only classified positions will list an increment date. All other positions are exempt from the State Salary Schedule and do not receive increments. **Review Date** will be available in this case.* 📖 *Note: Rules for entering an increment date: The State Salary Schedule identifies how many months until the next increment is due. In general: Positions at the last step must have an increment date in the past. Positions at step A should have an increment 6 months after the start date. All other steps (excluding*

the last step) should have yearly increments. The increment date must be later than the start date and the salary update date unless the position is at the last step.

21. **End Date**—allows you to end a position as of a date.
22. **Multiplier**—allows you to create a generic position and project for the number of multiples specified. 📖 *Note: Do not use this feature during your CIM release, each position must be created separately.*
23. **User Defined**—allows you to put in unique agency information.
24. **Updated Salary Date**—displays the last date the salary was updated. 📖 *Note: This date is important because it triggers the projection engine to decide whether or not to apply general salary increases and merit system increases. It assumes that as of that date, the salary amount is correct.*
25. **Job Class Risk**—displays the Job Class Risk ID number associated with the Job Class. This field only updates when the Job Class is changed.
26. **SubObject**—allows you to select the Object/Subobject for the position.
27. **% Full Time**—allows you to enter the percentage of time a position is slated to work.
28. **View Variable PT**—allows you to vary the slated work time by month. This can be expressed in days, hours or percent.
    - *Copy to 2nd Fiscal Yr*—allows you to copy numbers from the 1st Fiscal Year fields into the 2nd Fiscal Year Fields.
    - *Paste From Excel*—allows you to copy a selected row or column of number from an Excel spreadsheet into the Variable Part-Time fields. 📖 *Note: Whichever field the curser is in, that will be the starting position where the numbers will be pasted to (i.e. curser is in 1st Fiscal Year, Oct, that is where the first number in the selected row/column will appear; 1st Fiscal Year, July is the default starting point).*
    - Clear—allow you to clear all Variable Part-Time fields.
29. **Over Time %**—allows you to enter the percentage of overtime a position is slated to work.
30. **View Variable OT**—allows you to vary the slated overtime by month. This can be expressed in hours or percent.
    - *Copy to 2nd Fiscal Yr*—allows you to copy numbers from the 1st Fiscal Year fields into the 2nd Fiscal Year Fields.
    - *Paste From Excel*—allows you to copy a selected row or column of number from an Excel spreadsheet into the Variable OverTime fields. 📖 *Note: Whichever field the curser is in, that will be the starting position where the numbers will be pasted to (i.e. curser is in 1st Fiscal Year, Oct, that is where the first number in the selected row/column will appear; 1st Fiscal Year, July is the default starting point).*
    - Clear—allow you to clear all Variable OverTime fields.
31. **Health Insurance (BD) Included Flag**—allows you to include/exclude health insurance in the projection for the position.
32. **OASI (BA and BH) Included Flag**—allows you to include/exclude OASI in the projection for the position.
33. **Medical Aid Industrial Insurance (BC) Included Flag**—allows you to include/exclude Medical Aid Industrial Insurance in the projection for the position.
34. **Paid Family Medical Leave (BK) Included Flag**—allows you to include/exclude Medical Aid Industrial Insurance in the projection for the position.
35. **Funded Flag**—allows you to mark positions as funded or not.
36. **Calculate Staff Months Flag**—allows you to include/exclude staff months in the projection for the position.
37. **I-732 Indicator Flag**—allows you to mark positions as I-732. 📖 *Note: When a position contains a job class that is associated with I-732, the system will automatically flag the I-732 Indicator; however, newly added positions will not be flagged automatically.*
38. **Backfill Indicator Flag**—allows you to mark positions that necessitate being backfilled if vacated.
39. **Funding Activities Bar**—allows you to add or delete funds.
40. **Percent**—allows you to specify what percent of coding is attributable to staff months, salary and benefits. 📖 *Note: The funding percent must equal 100%.*

41. **Account Coding**—allows you to specify the coding associated to the position. 📖 *Note: The only required account codes from the funding grid are Pgm Index (Program Index) and EA Index (Expenditure Authority Index.)*

5. Select **Add/Copy to New Effective Date**

6. Select **View Invalid Data Comments** to see what types of errors are making the position invalid.

7. Enter today's date in the start date field and select **Save**. 📖 *Note: The system will warn you when you have not filled in fields that are required. See below:*
    <mark><Today's Date></mark>
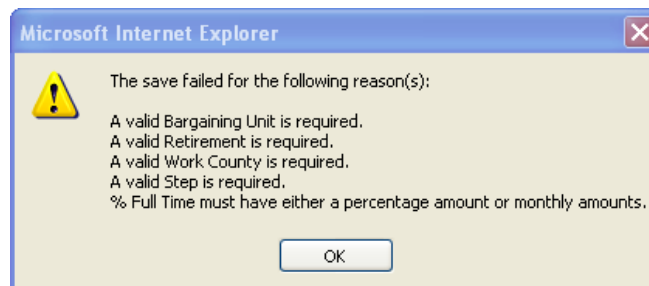
8. Enter the rest of the fields to make the record complete (Name, Step, Bargaining Unit, Retirement, Work County, Increment Date, % Full time) and select **Save**.
    <mark>**Name:** Vacant-New Hire</mark>
    <mark>**Step:** Choose one from the dropdown</mark>
    <mark>**Bargaining Unit:** Choose one from the dropdown</mark>
    <mark>**Retirement:** Choose one from the dropdown</mark>
    <mark>**Work City:** Either start typing or use the down arrow key on your keyboard to choose one</mark>
    <mark>**Work County:** Either start typing or use the down arrow key on your keyboard to choose one</mark>
    <mark>**Increment Date:** Choose a date that fits within the increment date rules</mark> 📖 *Note: Increment rules are found in Appendix 2*
    <mark>**% Full time:** Type in 100.0 for a full time position</mark>

Save Reset Add Run Projection Search Delete View Invalid Data Comments

Position Number 70004693   Name Vacant-New Hire

🛑 6/16/2016

Start Date	Pay Scale	Job Class	Working Title
6/16/2016 📅	0001 - Standard Progression (Non-Represented)	233C - COMMERCE SPECIALIST 3	COMMERCE SPECIALIST
(mm/dd/yyyy)			

Range	Step	Special Pay	Salary May Exceed Band	Y-Rated	Current Salary	Rate
58	D	☐	☐	☐	4,977.00	MONTHLY

Bargaining Unit	Personnel Area	Work City	Work County
0000 - Non-Represented General Government Employees	1030 - Department of Commerce	OLYMPIA	Thurston

Retirement	Increment Date	End Date	Multiplier	User Defined	Updated Salary Date	Job Class Risk
P2 - PERS Plan 2	05/14/2020 📅	📅	1		5/14/2019	4902
	(mm/dd/yyyy)	(mm/dd/yyyy)				

SubObject	% Full Time	Over Time %
AA - State Classified	100.0 View Variable PT	.0 View Variable OT

☑ Health Insurance (BD) Included   ☑ Funded   ☐ I-732 Indicator
☑ OASI (BA and BH) Included   ☑ Calculate Staff Months ☐ Backfill Indicator
☑ Medical Aid Industrial Insurance (BC) Included
☑ Paid Family Medical Leave (BK)

Funding

Add Fund Delete Fund

Percent	Pgm Index	EA Index	Org Index	SubSubObj	Project	SubProj	Proj Phase	Budget Unit	Alloc Code
☐ 100.00	72101 - Small B	012 - 001 Gf Sa			7200 - Small Bu	T6 - Step 2016			

  📖 *Note: The start date tab will change to the date you put in the start date once the position detail is saved successfully.*

9.   Select the **Vacant** tab and **Delete/Selected Effective Date** to remove this tab from your position file.

Save Reset Add Run Projection Search Delete View Invalid Data Comments
                                   Delete Position
Position Number 70004470   Selected Effective Date   Name

🛑 Vacant

Start Date	Pay Scale	Job Class	Working Title
📅	0101 - Standard Progression (WFSE)	233B - CTED SPEC 2	COMMERCE SPEC 2
(mm/dd/yyyy)			

Range	Step	Special Pay	Salary May Exceed Band	Y-Rated	Current Salary	Rate
52	[Select a Step]	☐	☐	☐	0.00	MONTHLY

Bargaining Unit	Personnel Area	Work City	Work County
[Select a Bargaining Unit]	1030 - Department of Commerce	OLYMPIA	[Enter or Select a Work

Retirement	Increment Date	End Date	Multiplier	User Defined	Updated Salary Date	Job Class Risk
[Select a Retirement]	📅	📅	1		4/26/2019	4902
	(mm/dd/yyyy)	(mm/dd/yyyy)				

SubObject	% Full Time	Over Time %
AA - State Classified	.0 View Variable PT	.0 View Variable OT

☑ Health Insurance (BD) Included   ☑ Funded   ☐ I-732 Indicator
☑ OASI (BA and BH) Included   ☑ Calculate Staff Months ☐ Backfill Indicator
☑ Medical Aid Industrial Insurance (BC) Included
☑ Paid Family Medical Leave (BK)

Funding

Add Fund Delete Fund

Percent	Pgm Index	EA Index	Org Index	SubSubObj	Project	SubProj	Proj Phase	Budget Unit	Alloc Code
☐ 100.00	12299 - ASD Ac	012 - 001 Gf Sal			1229 - ASD Actg	9C - ASD Actg			

10. You will receive the following warning message, select **OK** to proceed.
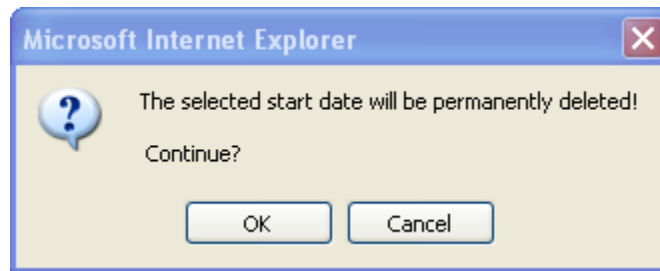
11. Select the **Position List breadcrumb** to return to the list of positions.

12. Repeat for each vacant position that should be included in projections.
    <mark>Update the next three vacant positions</mark>

Correct Invalid Filled Positions

13. Select a position from the invalid Position List that is filled.
    <mark>The first position with an employee name associated with it</mark>

14. Select the **View Invalid Data Comments** tab to determine what the error on the position is and **Hide Invalid Data Comments** to close the **Invalid Comments** box.

15. Update the position to correct listed errors and save changes.
    <mark>Go to page Appendix 2 to find explanations of exceptions and the remedy. Look for instances of these exceptions in your data and correct as indicated.</mark>

16. Select the **Position List breadcrumb** to return to the list of positions.

17. Repeat for up to 5 filled positions in the invalid Position List.

18. At this point the positions remaining on the list should be abolished positions.
    <mark>Assume the remaining invalid records are abolished positions and proceed to the next task for training/practice on how to Delete positions.</mark>

Lesson 2, Task 3 – Delete Extra Positions

> Once you have corrected all the known errors in needed positions, any remaining invalid position records can be deleted. However, since invalid records are not calculated in projections, this step is not necessary to ensure accurate projections from the file. It will help in navigating through your file to delete all remaining invalid records. This task assumes all remaining invalid records represent abolished positions and should be deleted.

1. Select the **Position List breadcrumb** to return to the list of positions.

2. Select **Select All** column title above the check boxes (this will change to Clear All upon selection) and the **Delete** tab.

3. The following warning will display, choose **OK**.
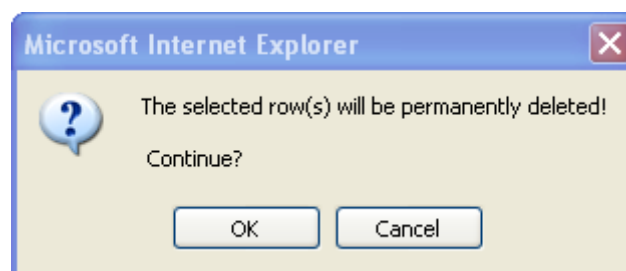
4. All positions will now be gone from your invalid position list.

Lesson 2, Task 4 – Update Positions to Reflect Known Changes

At this point all records will be valid and available for projection. This task will walk you through various other types of adjustments that are common to positions in order to accurately project salaries and benefits given known changes in your organization.

1. Select **View Valid Positions** to view only valid records for the position file.

Update a Position

2. Select the first position in the list (as long as it isn't the one you created in lesson 2, task 2 above) to open the **Position Detail.**

3. Update the **Working Title** to reflect a more descriptive title for the position. 📖 *Note: The Working Title will not automatically update when you select a job class and must be added or updated manually. The Working Title field will be what is displayed on the position list as well as the Position Listing Report.* Directors Secretary

4. Select the **View Variable OT** button.

5. Select a **Unit** of **Percent** and enter the appropriate percent of overtime in the appropriate months. 📖
   Note: The Overtime field on the Position Detail screen can be used when overtime is assumed to be consistent across all months of the biennium.
   10% in April, May, June, and July of both fiscal years
   Copy/Paste:
   a) Enter amounts for the 1st Fiscal Year and click on the **Copy to 2nd Fiscal Yr** to copy all numbers entered in the 1st Fiscal Year fields into the corresponding 2nd Fiscal Year fields.

b) **Clear** fields.

c) Open Excel and enter amounts in a column or row. Select amounts to copy. Click on the **Paste From Excel** button. Amounts will be pasted from spreadsheet. ▱ *Note: Whichever field the curser is in, that will be the starting position where the numbers will be pasted to (i.e. curser is in 1st Fiscal Year, Oct, that is where the first number in the selected row/column will appear; 1st Fiscal Year, July is the default starting point).*

6. Select the **Hide Variable OT** button to apply the overtime and close the box. ▱ *Note: Once information is entered in the Variable OT grid an asterisk will display.*

7. Repeat steps 5 and 6 when selecting the **Variable Part-Time** button.

8. Change the **Pgm Index** (Program Index) for the position. ▱ *Note: Fund coding changes can be selected by typing in partially/fully or using the down arrow key on your keyboard.* <mark>Select the third program index in the list</mark>

9. **Save** changes. ▱ *Note: The changes listed above are assumed to be effective for all projections. If you need to show an ending point for a projection and a beginning point for a different projection, you will need to end the current position and add a new start date for that position by using the **Copy to new effective date** option described below starting at step 13.*

10. Select the **Position List breadcrumb** to return to the list of positions.

End a Currently Filled Position

11. Select the next position in the list to open the **Position Detail.**

12. Enter an **End Date** for the position and **Save**.

13. Select the **Position List breadcrumb** to return to the list of positions.

Reclassify an Employee Keeping the Same Position Number

14. Select the next position in the list to open the **Position Detail.**

15. Select **Add/Copy to New Effective Date**. 📖 *Note: Copy to New Effective Date is used when changes will affect the salary projection results. It assumes the change is for the same person in the same position. A common use would be to record a future in-training promotion. Other edit options exist for adding new positions and employees. You also have the option of simply changing the original record if there is no reason to associate a change with a particular date.*

16. Enter a **Start Date** for when this person and position change will take effect, change the **Pay Scale** and **Job Class** for the position to reflect the future job class for the position, **Working Title** to describe the position, select the available **Salary Range** for the selected job class (or blank if no range exists for the job class), select the appropriate **Step**, update **Increment Date** if necessary and select **Save**.
    Start Date – 01/01/2019
    Pay Scale – 0001 Standard Progression (Non-Represented)
    Job Class – 479M – IT SPEC 5
    Working Title – IT SPECIALIST 5
    Range - 66
    Step - G
    Increment Date - 01/01/2020 or date that fits the increment date rules

17. You should now see two tabs for the selected **Position** and **Person** in the **Position Detail** screen. The second tab uses the Start Date entered from the last exercise.

18. Select the first tab that represents the previous start date for the position.

19. Verify the **End Date** is correct. The system should enter the day prior to the Start Date of the new instance into the original position. Adjust the **End Date** if necessary and **save** changes. 📖 *Note: Currently you must leave the position detail screen and return to it to see the end date populated.*

20. Select the **Position List breadcrumb** to return to the list of positions.

Add a New Position Copying Information from the Current Tab

21. Select the next <u>classified</u> position in the list and open the **Position Detail.**

22. Select **Add/Copy to New Position**. 📖 *Note: You can also add from the **Position Listing** screen but the Copy to New Effective Date and Copy to New Position will not be available.*

23. Enter the appropriate **Position #**, **Start Date**, and **Name** for the position.
    Position # – NEW1
    Start Date – 01/01/2019
    Name – Future Employee

24. Select **Save**.

25. Review the Position Detail and make adjustments as necessary.

26. Update **Increment Date** to reflect the next increment due, and **save** changes. 📖 *Note: If the position is at the last step, increment date must be in the past.*
    Increment Date – 01/01/2020

27. Select the **Position List breadcrumb** to return to the list of positions.

UPDATE FUNDING AND FIND A POSITION USING SEARCH

28. Select the next position in the list to open the **Position Detail.**

29. In the first funding row of the position, click each field available starting with **Pgm Index (Program Index)** and change the value to the first available in the list and also change the **SubObject**. 📖 *Note: You cannot change SubObject in the funding grid; you must select SubObject from the dropdown list box above the grid. This SubObject will be used for all lines of the funding.*

30. **Save** changes.

31. Select the **Search** tab.
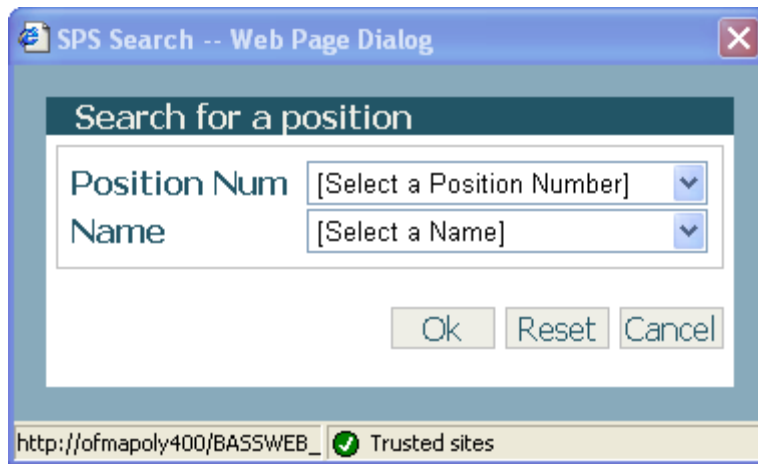
32. Use the dropdown arrow ▼ to bring up the list by **Name** and select your name, then hit **Ok**.
   📖 *Note: the **Search** brings up all valid and invalid positions.*

33. Select **Add Fund** to add a new line to the fund grid.

34. Enter a new fund line using the second option available in each field.

35. Update the proration amounts of all lines to ensure they add up to 100% by entering 50% each. If the lines do not add up to 100% upon a save you will receive an error message.
   📖 *Note: There are two rules in regard to funding:*
   - *Funding proration for a position must add up to 100% or you will not be able to save the record.*
   - *Both program index and expenditure authority index are required for each funding line in order to save. If a line is left blank you will not be able to save because these fields are required. Delete unnecessary rows.*

36. Give yourself (if you are in the file) or someone else a big raise. If the one you choose is not WMS, change the Pay Scale to 0002 and the job class to WMS01. You should now be able to enter a salary. Check the **Salary May Exceed Band** option to enter a salary that is above the salary band. <mark>Salary - $15,000</mark>

37. **Save** changes when all information is complete.

Lesson 2, Task 5 – Update Groups of Positions in One Transaction
(Make Position File Current, Bulk Update & Export)

SPS contains features that allow you to do mass updates: 1) Make Position File Current updates all classified positions for the current salary schedule including recent General Salary Increases and any increments due since the positions were last updated and 2) Bulk Update allows you to filter on a set of positions and then apply one update to all filtered positions in one step.

MAKE POSITION FILE CURRENT

1. Return to the **Position File List** screen.

2. Select the position file to update and the **Make Position File Current** tab.
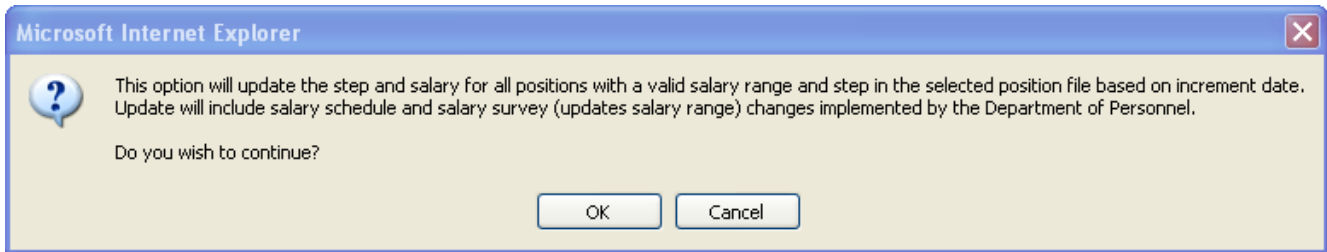
3. Read the confirmation message and select **OK** to continue with the **Make Position File Current**. 📖 *Note: The Make Position File Current option will update all positions with a valid salary range to apply any received increments or General Salary Increase increases since the salary was last updated. This step does not have an effect when the position file is already current.*

BASIC RULES FOR THE BULK UPDATE

- Program Index – You must be filtered on a single program index to bulk update program index.
- Expenditure Authority Index – You must be filtered on a single expenditure authority index to bulk update expenditure authority index.
- Organization Index – You must be filtered on a single organization index to bulk update organization index.
- Pay Scale – You must be filtered on a single job class to update pay scale.
- Job Class – You must be filtered on a single job class to bulk update job class. A pay scale must be selected to provide a list of job classes. The bulk update will also update the pay scale.
- Current Salary – You may multiply or divide to update the Current Salary. To increase salaries by 3.2%, select Multiply and enter 1.032. Only positions that do not have a salary range will be updated.
- Position Funded – Any filter combination can be used to Bulk Update the Position Funded flag (e.g., filter on name =, to update all positions with a blank name to Position Funded, No).
- Bargaining unit – Any filter combination can be used to Bulk Update bargaining unit (e.g., Filter on a job class with an organization index to update to a specific bargaining unit).
- Backfill Indicator – Used to indicate positions that require coverage in the case of leave. Any filter combination can be used to Bulk Update Backfill Indicator (e.g., Filter on a job class within a program index to update positions that require backfill).
- You can mix and match any of the fields for multiple updates at one time (e.g., update job class and backfill indicator or update organization index and bargaining unit).

UPDATE TO NEW JOB CLASS

5. Return to the **Position File List** screen.

6. Select **Filter/Set Filter** and select the **Position** tab. Enter a **Job Class** code to update. Then select **Ok**.

7. Select the position file to update and the **Bulk Update** tab.

8. Select the **Pay Scale** and appropriate **Job Class** for updating the positions. Then select **Ok**.

9. Select **Ok** once you have confirmed the expected number of records for update.

10. Review the list and note that the job class has been updated.

  📖 *Note: The position filter has been updated to the updated job class. If positions had already existed with this job class these will also display if you go to the position list.*
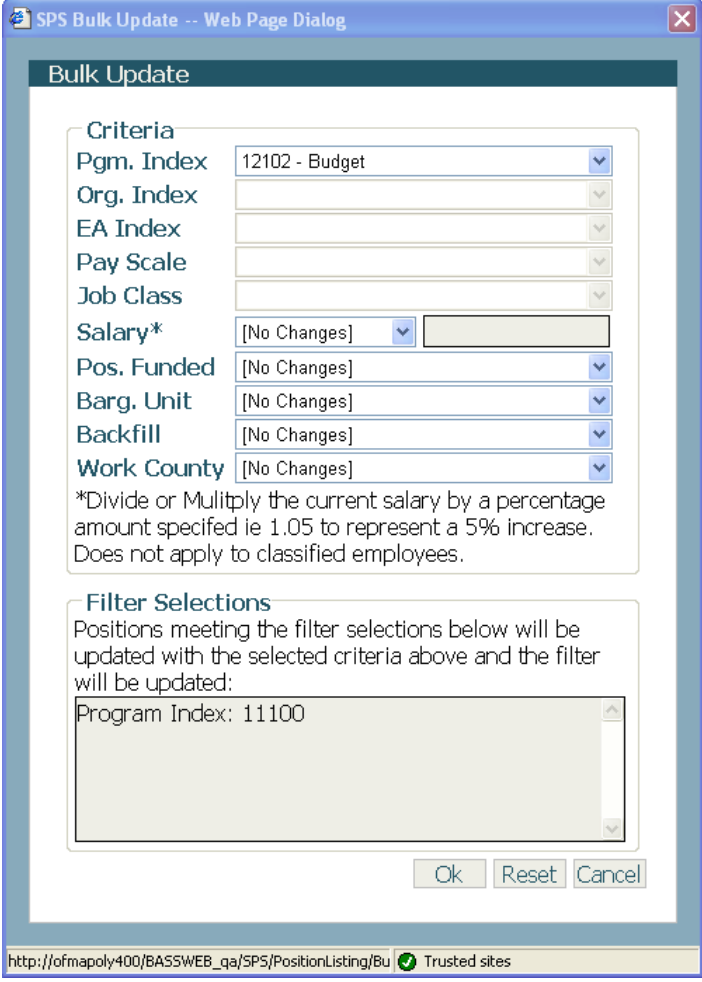
  📖 *Note: If the updated job class had a different salary range, all positions would have received this salary range and the salary would have been updated to that salary range given the positions' current step.*

  📖 *Note: Positions that have ended with a date prior to today will not be updated.*

11. Select **Filter/Clear Filter**.

12. Select **Filter/Set Filter** and select the **Account** tab. Enter a **Pgm. Index** code to update by either typing in the code or selecting the [...].   Then select **Ok**.

13. Select the position file to update and the **Bulk Update** tab.

14. Select the updated funding code for the funding element filtered on. ⚲ *Note: You can only update for program index, organization index, or expenditure authority index when the index is filtered to a single value. Funding options will not be available for selection when this is not true. However, you may update all of program index, organization index, and appropriation index by filtering on one selection in each.*

15. Select **Ok**.
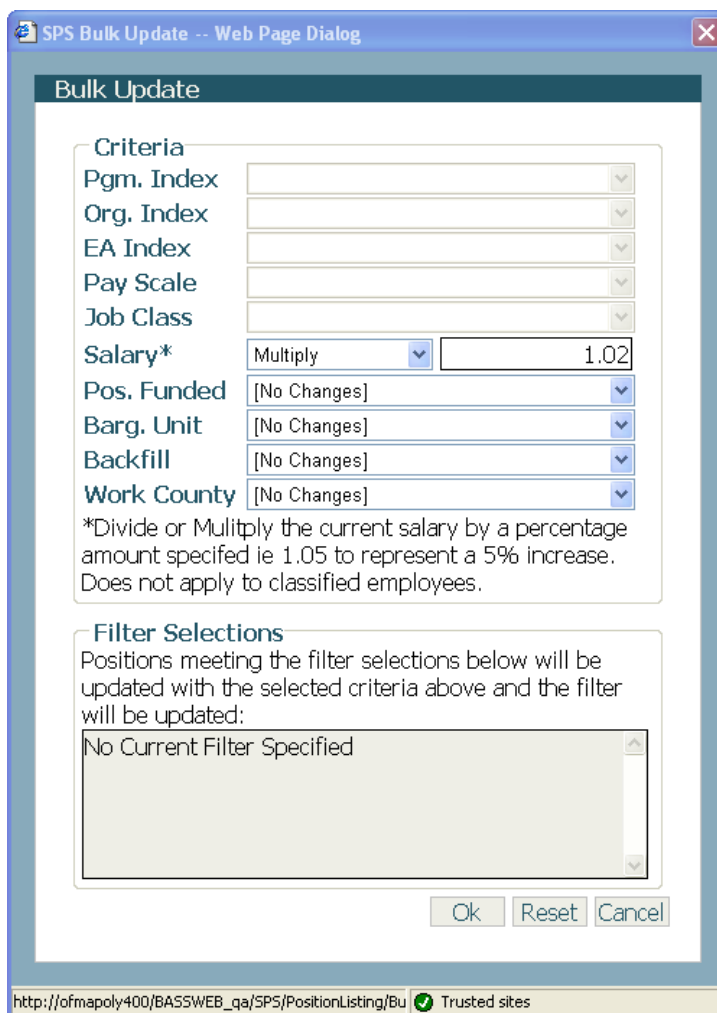
16. Select **OK** once you have confirmed the expected number of records for update.

17. Go to a position in the **Position Listing** to verify the funding update. ☐ *Note: The position filter has been updated to the updated funding index. If positions had already existed with this index, these will also display in the position list.*

18. Select **Filter/Clear Filter**.

UPDATE NON-CLASSIFIED POSITION SALARIES

19. Select the position file to update and the **Bulk Update** tab.

20. Select the appropriate operator (**Divide/Multiply**) from the dropdown box next to **Salary**.

21. Enter the value for salary update.
 ☐ *Note: Use * 1.02 to increase salary by 2%.* Then select **Ok**.
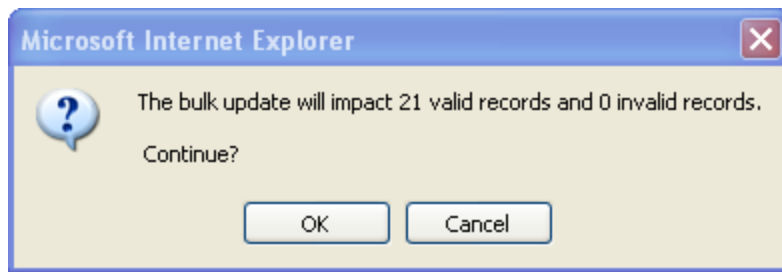
22. Select **OK** once you have confirmed the expected number of records for update.
    📖 *Note: The count should only include positions that match the filter criteria that do not have a salary range assigned.*

23. Go to a position in the **Position Listing** to verify the salary update.

Lesson 2, Task 6 – Export/Import Records to Update Funding

> SPS allows users to export position data, update funding information, and import it back into SPS in order to allocate position funding. This will allow agencies that use labor distribution or cost allocation methods to update funding records outside of SPS and to have the updates reflected in SPS for allotments or CIM. Updates outside of SPS are most likely to happen in Excel, but can happen in any system as long as a tab-delimited .txt file is imported.

📖 *Note: This functionality cannot be used to update position information. Position data must be updated manually, one position at a time.*

24. Select the position file to export and the **Export/Funding** tab. 📖 *Note: Export/Assignment Pay is only available for Washington State Patrol at this time. See Appendix 4 – Export/Import Records to Update Assignment Pay (Washington State Patrol Only).*

25. The following Export Data dialog box will display, select the **Export Data** button.
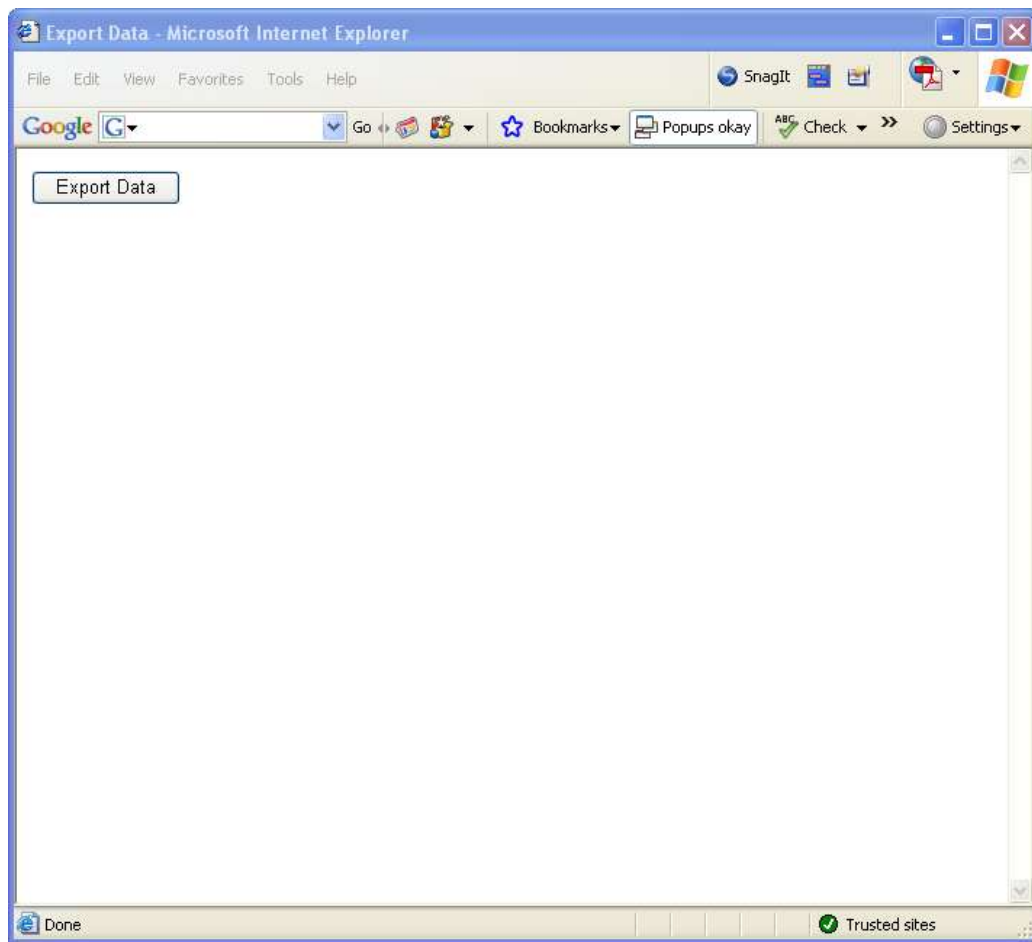
26.   The following File Download dialog box will display. Select **Save**.
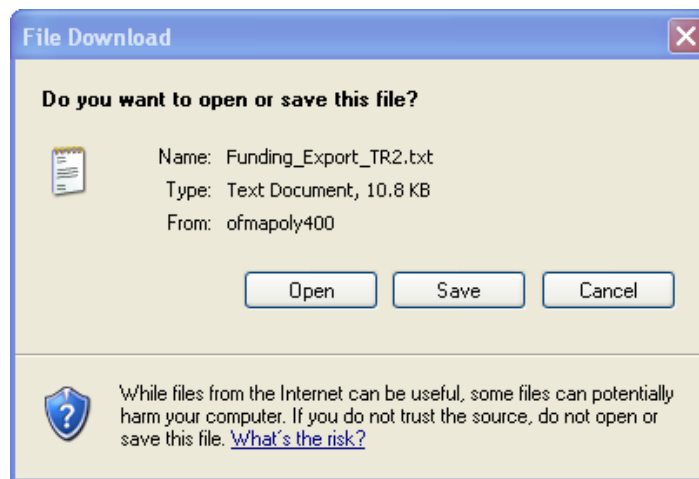
27. Use the Save As dialog box to select the location and name for saving the exported file then select **Save**.
   📖 *Note: The **Save as Type** must be text.*

28. You will receive the following message. Close the dialog box.

29. View the **Position File List** to make sure the Exported column says "Funding".
    📖 *Note: Once the file is exported it is marked as funding and the file cannot be updated. Users with Budget Operations access may set the **Exported** flag to None by going through Update on the Position File List.*

30. Open **Excel**.

31. Select **File/Open**.

32. Change the Files of Type to **Text Files.**

33. Select the file exported in step 27.

34. Select **Open** to open the Exported file. This will bring up the Text Import Wizard. Select **Original data type** as delimited, then select **Next**.

35. Check to select the **Tab** under the **Delimiters** option, then select **Next**.

36. For each column that has data that begins with a zero, click the column then select **Text** under **Column data format**. 📖 *Note: This step is critical so that data does not lose leading zeros once imported into Excel. For example, without this step, Fund 001 will be imported as Fund 1. There is a short cut of holding down the Shift key to highlight selected columns plus all columns in between.*
Position Number
Person ID
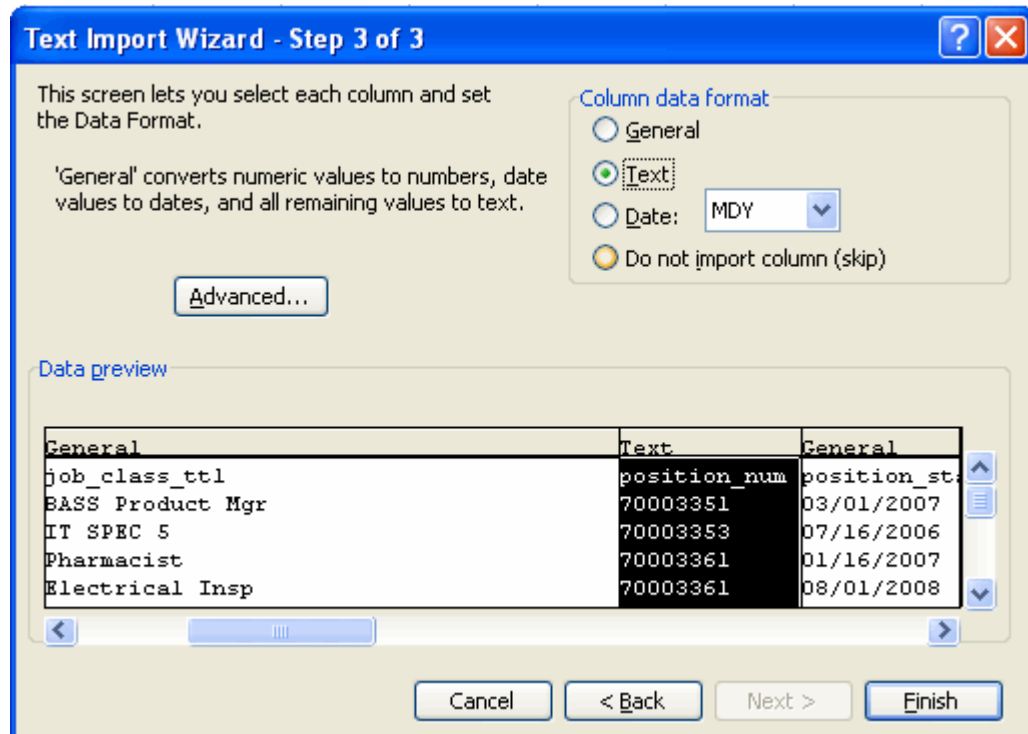
37. Select **Finish** once all required columns are marked as **Text** to open the file.

38. With the opened file you can change account code funding elements on a position or create additional rows in Excel to provide additional lines of funding. 📖 *Note: You cannot use this to update position data such as job class or job class title.* 📖 *Note: Please study the chart below for data rules and examples.*
Skip funding updates in training

Header	Datatype	Example	Imported?	Import Validation
agency*	char(3)	105	No	1. Required 2. Must match file
position_group_id*	char(3)	010	No	1. Required 2. Must match file
person_name	varchar(30)	Doe, John	No	N/A
job_class_ttl	char(16)	COM VEH ENF OF 2	No	N/A
position_num*	char(8)	0186	No	1. Required 2. Must match with exported position
position_start_dt*	datetime	01/01/2005	No	1. (Required) Must be a valid datetime (tier 1) 2. Must match with exported position
person_id*	int	12345	No	1. (Required) Must be a valid int (tier 1) 2. Must match with exported position
payroll_org	char(6)	123456	No	N/A
user_defined	char(5)	12345	No	N/A
subsubobject	char(4)	1234	Yes	1. If used, must meet length and allowable character rules
master_index	char(8)	12345678	Yes	1. If used, must meet length and allowable character rules
ea_index	char(3)	030	Yes	1. if used, must meet length and allowable character rules
program_index	char(5)	00150	Yes	If used, must meet length and allowable character rules
organization_index	char(4)	2400	Yes	1. If used, must meet length and allowable character rules
project	char(4)	EXY1	Yes	1. If used, must meet length and allowable character rules
subproject	char(2)	01	Yes	1. Must not be used if project is not used. 2. If used, must meet length and allowable character rules
project_phase	char(2)	01	Yes	1. Must not be used if project or subproject is not used. 2. If used, must meet length and allowable character rules
budget_unit	char(3)	G75	Yes	1. If used, must meet length and allowable character rules
allocation_code	char(4)	9999	Yes	1. If used, must meet length and allowable character rules
proration_pct	numeric(4,1)	100.0	Yes	1.If used, must be a valid numeric(4,1) (tier 1)
Note: all validation is tier 2 except where noted.				

39. Select **Save As** to save the file.

40. Reselect the exported file name and select **Save.**

41. Select **Yes** to replace the existing file.
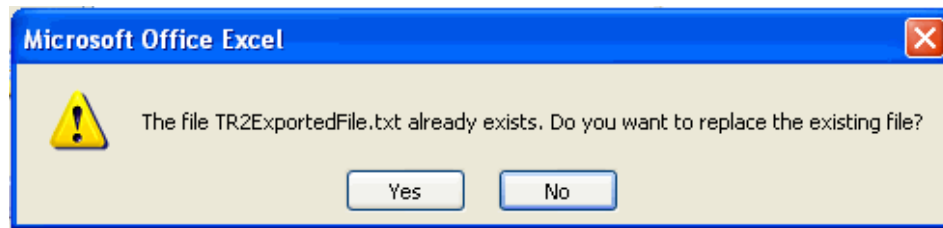
42. Select **Yes** to the notice that you are saving a text file.
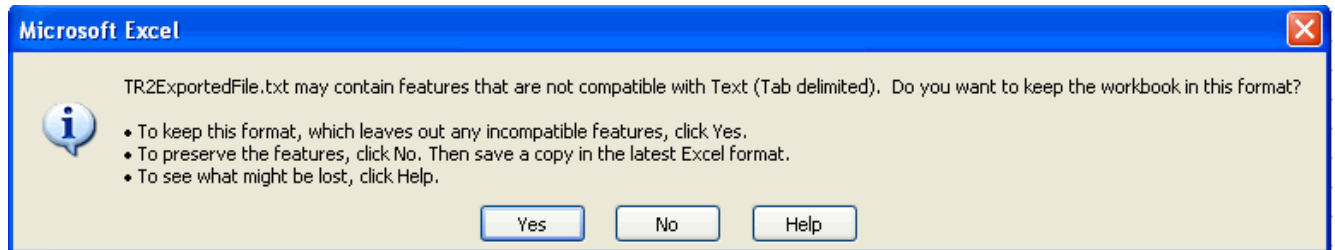
43. Go back to SPS to the **Position File List** screen.

44. Select the position file that was originally exported and the **Import/Funding** tab.

45. Browse for the exported file from the Import Funding dialog box.
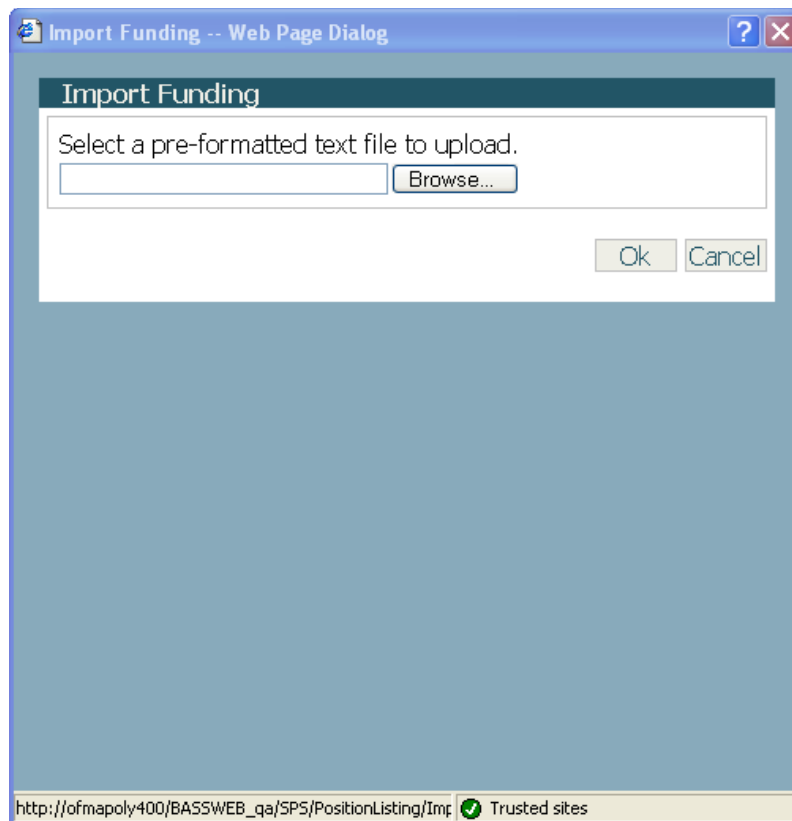
46. Select the file to import and select **Open.**
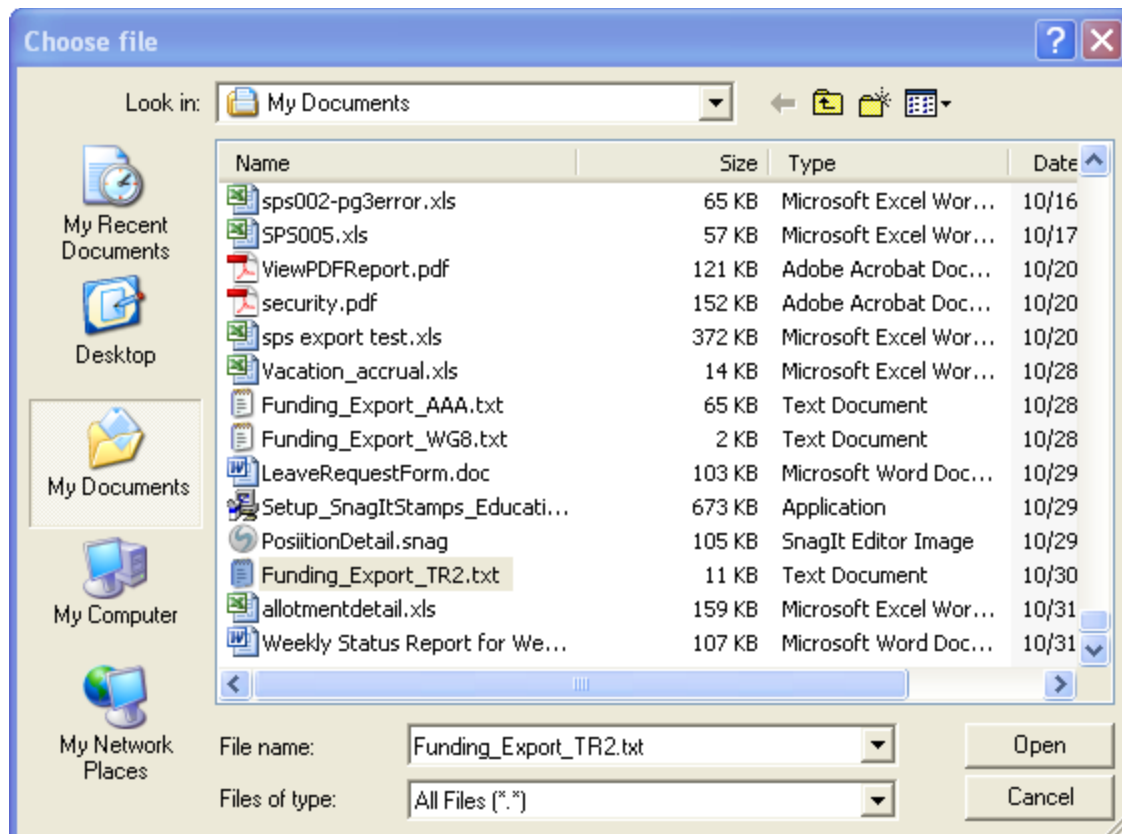
47. Verify the file was filled in correctly in the Import Funding dialog box and select **Ok**.
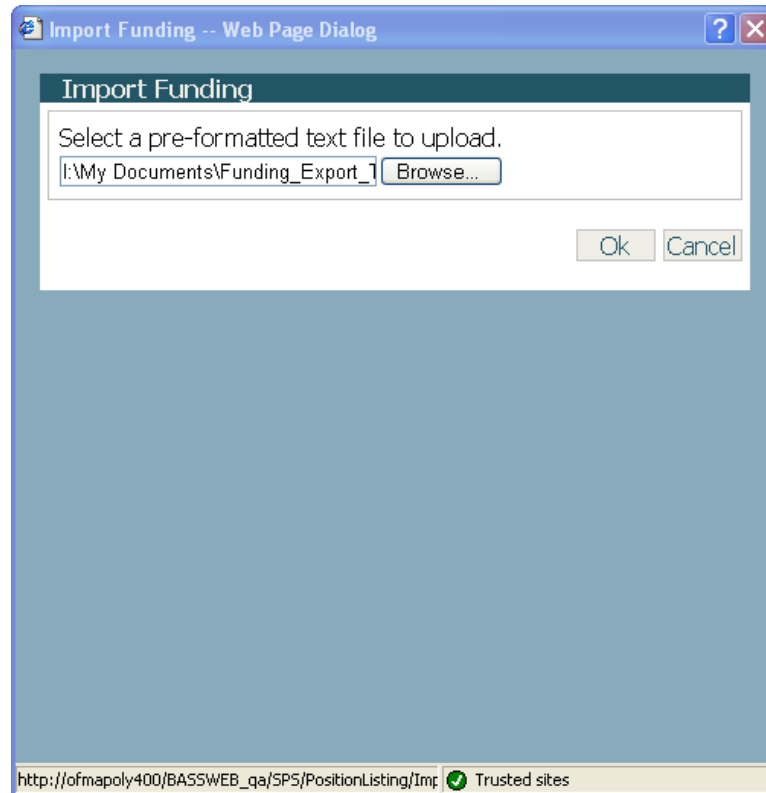
48. If there are errors, you will receive a Funding Import Error Report that you can Print to recall how to fix the errors.
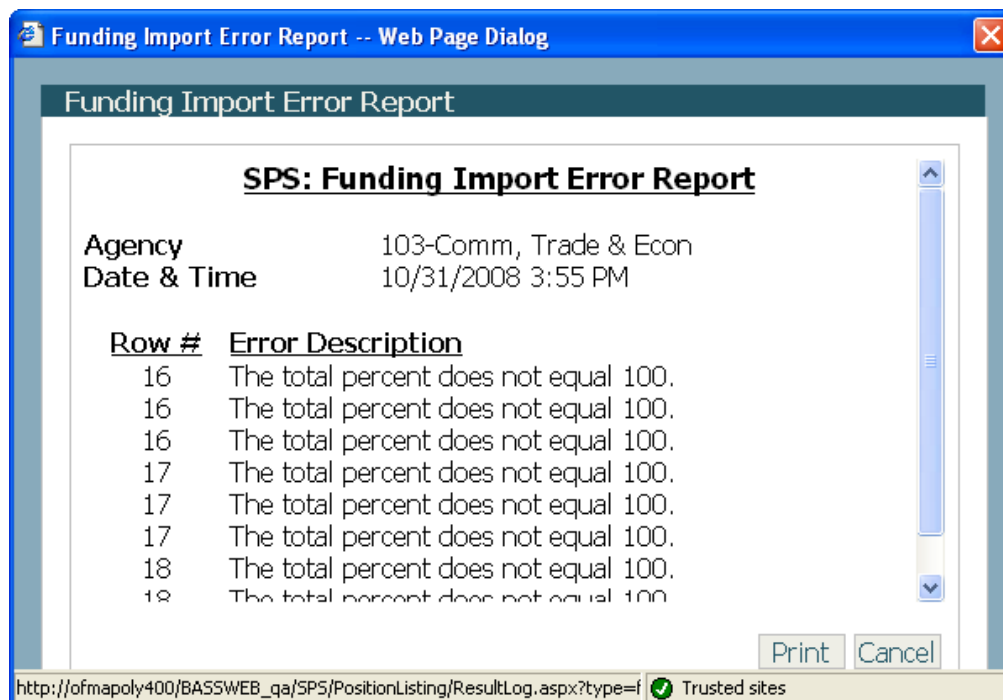
49. Once errors have been corrected repeat steps 43-47.

50. Once everything has been corrected and is in the correct format you will receive the following message.

Microsoft Internet Explorer

⚠ File uploaded successfully.

OK

51. Select **OK** and you will return back to the position file list screen.

Lesson 2, Task 7 – Verify the Position File

It is almost time to start running and viewing projections now that the position file has been updated. But first we'll want to verify the position file we have created to ensure the projection is calculated off the correct information.

1. Select the position file to verify and the **Reports/Position Listing** tab.
   📖 *Note: Position reports will only be enabled under Position on the Application tab bar, Projection reports will only be enabled under Projections on the Application tab bar.*

2. This will display the Report Parameter Selections dialog box. Select a sort option of **Position Number** by clicking the ⌄. Also, select a Format Option of **View as PDF** by clicking on the radio button in front of the option. 📖 *Note: There are three format options: "View as PDF" is designed for printing; "View as HTML" is available for quick navigation to a position and for export, but column titles may overlap; "HTML formatted for Export" is designed for exporting nicely, column titles were shortened to accomplish this.*

Report Parameter Selections -- Web Page Dialog

Parameters for Position Listing Report

File Selection

File ID   TR2 - Trainer - Copy To File

Filter   No Current Filter Specified

Parameter Selections

Sort Option Position Number

Format Option
⦿ View as PDF   ○ View as HTML   ○ HTML formatted for Export

Run   Cancel

http://ofmapoly400/BASSWEB_qa/SPS/CommonUI/ReportPar   ✓ Trusted sites

3.   Select **Run** to generate the report. 📖 *Note: You will only be able to run one report at a time; previously generated reports will be overwritten by the new parameter selections.*

4.   Select the Printer icon to print this report.
      No need to print when in a training session

5.   Select the **X** in the upper right hand corner to close the report screen.

6.   Verify the data or route to manager for verification. If errors exist, return to the **Position Listing** to edit, add, or delete position records as necessary. The report includes an **Invalid** column to easily identify any position records that remain in the file as invalid.

    📖 *Note: When an HTML format option is chosen, the* *icon will present options for exporting the report as a Crystal Report, Adobe Acrobat (PDF), Excel, Word or Rich Text Format (RTF). You could export the report and attach to an e-mail to facilitate sharing results for validation.* Assume no changes needed for training

LESSON 3 – RUN A PROJECTION

Lesson 3, Task 1 – Run a Projection and Save Results

> The process of running a projection is separate from the process of running a report. This task will explore creating the projection and the option of saving the results. When you run a projection, it will run on the entire file whether a filter is set or not.

1.   Select the position file to run the projection on and the **Run Projection** tab.

2.   This will bring up the SPS Run Projection dialog box. Select the **Projection Parameters** to be included in the projection calculation. 📖 *Note:*
   - *Include increments/merit increases will apply step increases to classified employees;*
   - *Include General Salary Increase (GSI) will look to see if a GSI adjustment has been indicated for the projection period by the SPS administrator and apply the increase;*
   - *Include 6767/salary survey will check for changes in the Job Class schedule for salary range in the projection period and calculate the salary using any new salary ranges found;*
   - *Include only positions marked "Funded" in projection results will exclude any positions that are not checked funded.*
   Include all four options

3.   Select the **Biennium** for which to project salaries.
   2019-21
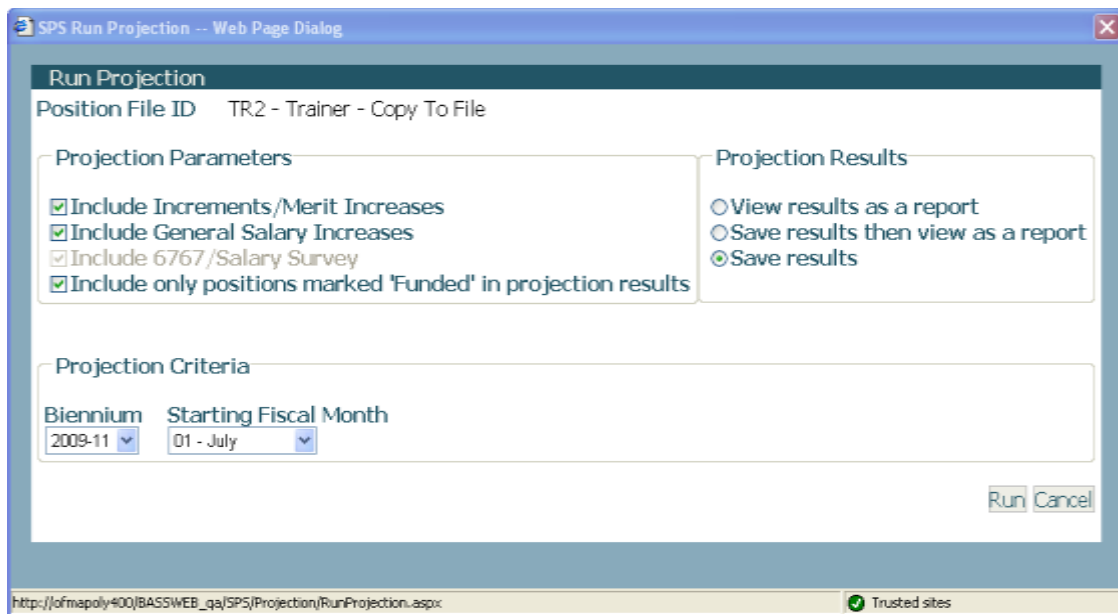
4.   Select the **Starting Fiscal Month** for the projection. 📖 *Note: The display of the dropdown list box options is FM – Name (i.e., 14 – September is September of the second fiscal year). Picking a fiscal month other than 01-July will create zero amounts in preceding fiscal months.*
   01-July

5.   Select an option for the Projection Results. 📖 *Note:*
   - *View results as a report will create an Allotment Summary report without first saving the projection data. You will have an option of saving the projection data once the report is displayed.*
   - *Save results then view as a report will ask you to enter a file ID and title to save the projection results prior to running the Allotment Summary report.*
   - *Save results will ask you to enter a file ID and title to save the projection results, but no report will be produced. Since the file is saved, you can still run any of the reports available for the projection file from the reporting option.*
   Save results

6.   Select **Run** to begin the projection process.
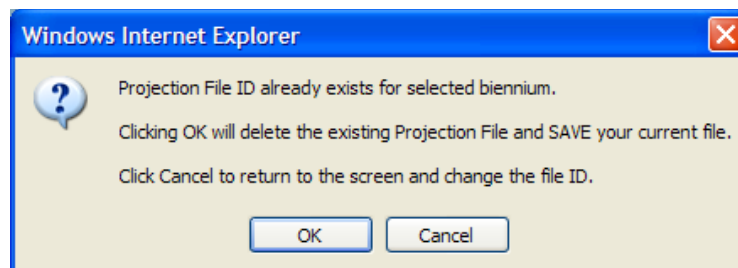
Enter a desired **Projection File ID** and **Title** for this projection result.

☍ *Note: The Projection Files are independent of the Position Files. You can enter any ID including the same ID as used for the Position File.*

- *If the ID has already been used for the selected Projection Period for the indicated biennium (step 3 above), and you have the authority^{✻} to delete a projection file, you are given the opportunity to OVERWRITE the existing projection file (be aware that the previous projection file will be deleted before the new one with the same Projection File ID is created).*

📕 *Note: Occasionally, a Run Projection failed! message will display when a projection file with the same ID already exists. Try to run projection again as this is an intermittent anomaly.*

❊ *Edit Access users can only overwrite/delete their own files*
OFM Administrators and Budget Operations can overwrite/delete any file

• *The system will automatically default to the chosen position file ID and Title.*
<your initials>1 – <your name> - Projection
TR2 – Trainer – Copy To File

7.　　Enter a comment that adequately describes the projection results. 📕 *Note: The parameters selected to run the projection are saved with the Projection file and are available in the Projection File list (reviewed in Lesson 3, task 2) as well as displayed on reports. You may choose to use the comments to enter information not otherwise captured.*
Projection for Training

8.　　Select **Save** to run and save projection.

Lesson 3, Task 2 – Lock a Projection File and Update Comments

The Projection File List screen enables you to view information about your agency's projection files as well as perform various tasks with those files. Informational items include number of records, file owner, extract date, etc. Functions allow you (depending on your security level) to lock projection files, enter file comments, or change file title. Each column can be sorted in ascending or descending order according to user preference.

1.　　Select **Projections** from the Application tab bar.

1.　　**Activities Bar**—allows you to perform actions related to a specific projection file or files. This includes Update, Filter, Reports and Delete.

- The Update tab allows you to update the projection file title, comments, and operations lock depending on your security.
- The Filter tab allows you to set or clear the filter that you want to apply to the projection reports.
- The Reports tab allows you to run projection reports for a projection file chosen. *See Lesson3, Task 3 for more information.*
- The Delete tab allows you to delete one or several projection files.

2. **Projection File Selection Box**—allows you to work with a particular projection file or files.
3. **Biennium**—indicates for which biennium the projection file was run.
4. **Projection File ID**—displays the chosen three character ID.
5. **Projection File Title**—displays the chosen title.
6. **Operations Lock**—displays a lock indicator if an operations user has locked the file. To remove this lock you must go through the update tab.
7. **Comments Indicator**—displays whether comments are associated with the projection file. To view click on the check mark and to close click the check mark again. To change comments you must go through the update tab.
8. **Owner**—displays who owns the projection file and if you hover over the name, the date and time the projection was run.
9. **Record Count**—displays the total number of records in the projection file.
10. **Extract Date**—displays the date the HR Data was loaded into the position file.
11. **Position File ID**—displays the three character ID of the Position file for which the projection was run.
12. **Starting Fiscal Month**—Displays the chosen starting month for which the projection begins.
13. **Includes Increments**—Displays a check mark if increments were included in the projection.
14. **Includes General Increases**— Displays a check mark if general salary increases were included in the projection.
15. **Includes 6767/Salary Survey** — Displays a check mark if 6767/Salary Survey salary increases were included in the projection. 📖 *Note: By default the 6767/Salary Survey parameter is always included, so the projection file list will always show this as checked.*
16. **Includes Funded Only**—Displays a check mark if Only Positions Marked Funded were included in the projection.
17. **Funding Titles Biennium**—displays from which biennium the funding titles are edited against.

2. Select the projection file and the **Update** tab to change the **Comments** and **Lock** the file.

Comment: Projection for Training—locking the file.

3.   Select **Save** to save changes.

Lesson 3, Task 3 – View Projection Reports

> The projection results are now saved as an independent file. There are five varieties of projection reports available for reporting the results with a number of flexible sort options. Reports may also be filtered to limit the type of position projections included in the report.

1. .   Select the projection file and the **Reports** tab to see the available reporting options.
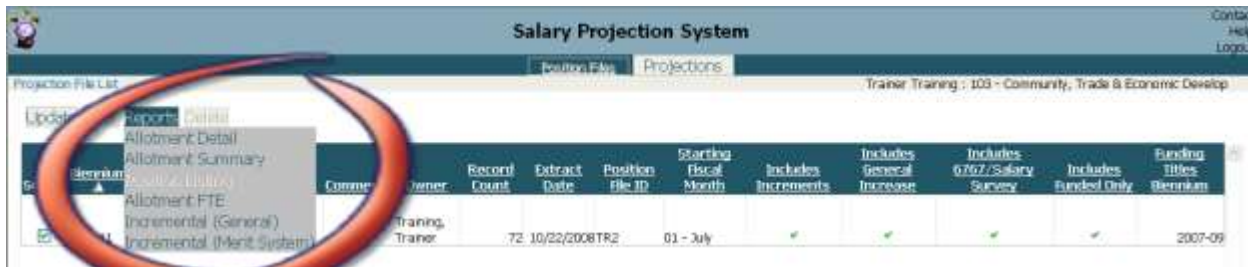
2.   Select the **Allotment Summary** report. This will display the Report Parameter Selections dialog box.

   Select **Sort Option/Program, Subprogram** and **Format Option/View as PDF.**

   📖 *Note: Each sort option will create a report with sorting and subtotals as chosen. All summary reports will be subtotaled on Appropriation Index within the selected group. SPS groups Appropriation Index based on the first two characters when defined with the same fund and appropriation type, so that related Appropriation Indexes (i.e., 011 and 012, both fund 001 and appropriation type 1) will be displayed on the same page.*

Sort Option: Program, Subprogram
Format Option: View as PDF

3.   Select **Run** to view report

SPS002

Salary Projection System
Allotment Summary Report

Page 1 of 61
5/16/2019
12:11:08PM

Projection File:	541 next bien			Increments:	Yes
Agency:	105 Office of Financial Management			6767:	Yes
Biennium:	2019-21	StartingFiscalMonth:	01 - July	COLA:	Yes
ProjectionRunDate:	05/01/2019	Position File:	541 next bien	Funded:	No
Filter:	No filter applied				
Sort By:	Program, SubProgram				

Program: 010 Administration
SubProgram:
Expenditure Authority Index: 012 Salaries and Expenses - FY2

Fiscal Year 2020	July	August	September	October	November	December	January	February	March	April	May	June	Total
Staff Months	6.70	6.70	6.70	6.70	6.70	6.70	6.70	6.70	6.70	6.70	6.70	6.70	80.40
AC State Exempt	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	693,084
Salary Total	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	693,084
BA OASI	578	578	521	443	443	377	578	578	578	578	578	578	6,408
BB Retirement	5,776	5,776	5,776	5,776	5,776	5,776	5,776	5,776	5,776	5,776	5,776	5,776	69,312
BC Medical	167	167	167	167	167	167	167	167	167	167	167	167	2,004
BD Health	6,800	6,800	6,800	6,800	6,800	6,800	6,800	6,800	6,800	6,800	6,800	6,800	81,600
BH Medicare	1,155	1,155	1,155	1,155	1,155	1,155	1,155	1,155	1,155	1,155	1,155	1,155	13,860
BK PFML	1,733	1,733	1,564	1,329	1,329	1,132	1,733	1,733	1,733	1,733	1,733	1,733	19,218
Benefits Total	16,209	16,209	15,983	15,670	15,670	15,407	16,209	16,209	16,209	16,209	16,209	16,209	192,402
Total Salary + Benefits	73,966	73,966	73,740	73,427	73,427	73,164	73,966	73,966	73,966	73,966	73,966	73,966	885,486

Fiscal Year 2021	July	August	September	October	November	December	January	February	March	April	May	June	Total
Staff Months	6.70	6.70	6.70	6.70	6.70	6.70	6.70	6.70	6.70	6.70	6.70	6.70	80.40
AC State Exempt	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	693,084
Salary Total	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	57,757	693,084
BA OASI	578	578	521	443	443	377	578	578	578	578	578	578	6,408
BB Retirement	5,776	5,776	5,776	5,776	5,776	5,776	5,776	5,776	5,776	5,776	5,776	5,776	69,312
BC Medical	167	167	167	167	167	167	167	167	167	167	167	167	2,004
BD Health	6,800	6,800	6,800	6,800	6,800	6,800	6,800	6,800	6,800	6,800	6,800	6,800	81,600
BH Medicare	1,155	1,155	1,155	1,155	1,155	1,155	1,155	1,155	1,155	1,155	1,155	1,155	13,860
BK PFML	1,733	1,733	1,564	1,329	1,329	1,132	1,733	1,733	1,733	1,733	1,733	1,733	19,218
Benefits Total	16,209	16,209	15,983	15,670	15,670	15,407	16,209	16,209	16,209	16,209	16,209	16,209	192,402
Total Salary + Benefits	73,966	73,966	73,740	73,427	73,427	73,164	73,966	73,966	73,966	73,966	73,966	73,966	885,486

4.   Scroll through the pages to review the format, layout, and totals.

5   Close the report to return to the **Projection File List** screen.

6.   Select **Filter/Set Filter** and the **Position** tab.

7. Type your last name plus an * in the **Name** field of the filter. 📖 *Note: The filter allows a search on last name only. This can be a partial or full last name. The filter does not allow commas or spaces. By entering the "*" the filter will look for all names that match the letters entered here.*
   e.g., employ

8. Select **Ok** to apply the filter.

9. Select the **Reports/Allotment Detail** tab.

10. Select the desired **Sort Option/Position Number** and **Format Option/View as HTML** option for the report. 📖 *Note: The Allotment Detail report will show all details for each combination of position number, person, and fund code.*
    Sort Option: Position Number
    Format Option: View as HTML

11. Select **Run** to view report

Salary Projection System
Allotment Detail Report

Projection File:	516 PFML		
Agency:	163 Consolidated Technology Services	Increments:	Yes
Biennium:	2017-19	Starting Fiscal Month: 01 – July	6767:	Yes
Projection Run Date:	05/16/2019	Position File: 516 PFML	COLA:	Yes
Sort By:	Position Number		Funded:	No
Filter:	No filter applied		

Position Number:	71027130 Part Time Percent: 100.00	Job Class: OFM006 OFM Exec Mgr	Program Index:	L0120
Name:	no name listed	Range: Step:	Organization Index:	1200
Position Start Date:	04/16/2012 Termination Date:	Increment Date:	Proj/Subproj/Phase:	ITMO//
Pay Code:	S Retirement Plan: P2 PERS Plan 2	Fund-AT: 458-1 Consolidated Tech Serv Revol Budget Unit:	
Expenditure Authority Index: 070 CTS Services (OCIO - Appropriated)		Proration Percent:	100.00

Fiscal Year 2018	July	August	September	October	November	December	January	February	March	April	May	June	Total
Staff Months	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	12.00
AC State Exempt	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	154,524.00
Salary Total	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	154,524.00
BA OASI	798.37	798.37	798.37	701.03	0.00	0.00	128.77	128.77	128.77	128.77	128.77	128.77	3,868.76
BB Retirement	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	19,346.40
BC Medical	43.98	43.98	43.98	43.98	43.98	43.98	39.58	39.58	39.58	39.58	39.58	39.58	501.36
BD Health	913.00	913.00	913.00	913.00	913.00	913.00	913.00	913.00	913.00	913.00	913.00	913.00	10,956.00
BH Medicare	257.54	257.54	257.54	257.54	257.54	257.54	257.54	257.54	257.54	257.54	257.54	257.54	3,090.48
BK PFML	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Benefits Total	3,625.09	3,625.09	3,625.09	3,527.75	2,826.72	2,826.72	2,951.09	2,951.09	2,951.09	2,951.09	2,951.09	2,951.09	37,763.00
Total Salary + Benefits	16,502.09	16,502.09	16,502.09	16,404.75	15,703.72	15,703.72	15,828.09	15,828.09	15,828.09	15,828.09	15,828.09	15,828.09	192,287.00

12. Review the report, noting the report header that identifies the filter set and page headers that indicates the person, position, and funding the page represents. 📖 *Note: The Allotment Detail report will allow you to investigate anomalies in your Allotment Summary at the detail level. It is recommended that you do not print an Allotment Detail report for your entire agency. The details of the projection are saved in SPS with the projection file and can be reported on any time producing the same results as the initial report.* 📖 *Note: You will need to filter your report down to 3,000 records in order to run the allotment detail report.*

13. Close the report to return to the **Projection File List** screen.

LESSON 4 – DATA RELEASE FOR COMPENSATION IMPACT MODEL (CIM)

Lesson 4, Task 1 – Check CIM Release Edit Report

> OFM will ask for position data once per biennium. This data is loaded into OFM's Compensation Impact Model (CIM) where they can use the position information to develop scenarios to support labor relations and bargaining or determine compensation change allocations to agencies per enacted budgets. This data is collected well in advance of the biennium in which it will be used. Data submitted for CIM should reflect the best guess maintenance level of the ensuing biennium budget.

1. Create a position file using the current funding titles biennium. 📖 *Note: Do not use the biennium for which you are submitting the data because the titles will not yet exist in AFRS and will make all of your positions invalid. For example, you will need to use the 2019-21 Funding Titles Biennium when creating your 2021-23 CIM file.*

2. Complete the steps of Lesson 2 – Edit your position file to prepare a position file that represents your best guess ==maintenance level== for the ensuing biennium. 📖 *Note: Do not use the multiplier feature on the position detail screen during your CIM release, each position must be created separately.*

3. Before releasing your information you will want to check your CIM Pre-Release Edit Report. Select **Position Files** from the Application tab bar.

4. Select the **Position File Selection box**, and then select the **Release/Pre-Release Edits** tab from the activities bar.
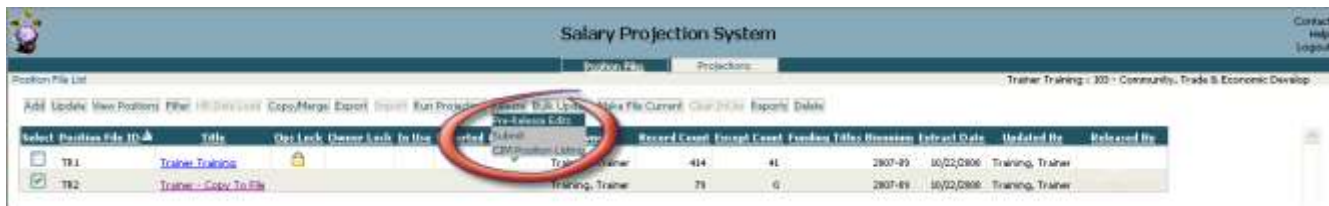
5. This will display the Salary Projection System: Edit Report. 📖 *Note: This report will provide you with Critical errors (these must be fixed) and Warning errors to evaluate whether or not you need to go back and fix these to include in your release. If the warnings are not fixed, those positions will not be included in your released information. This report is run unfiltered, regardless if a filter is set or not.*
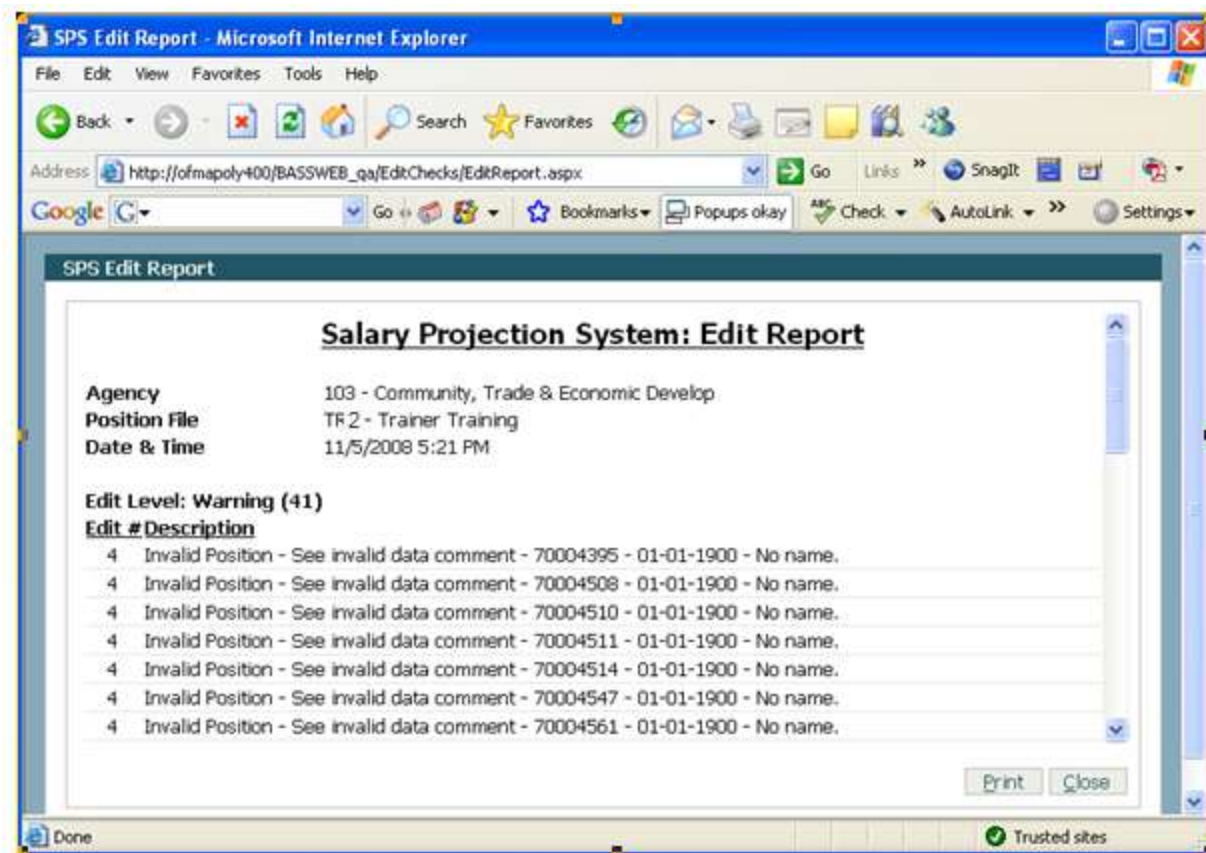
6.   Select **Close** to close the report.

Lesson 4, Task 2 – Release Data to OFM for CIM

1.   Once you are satisfied with your file select the **Position File Selection box** for the file you wish to release, and then select the **Release/Submit** tab from the activities bar. The following message will display:
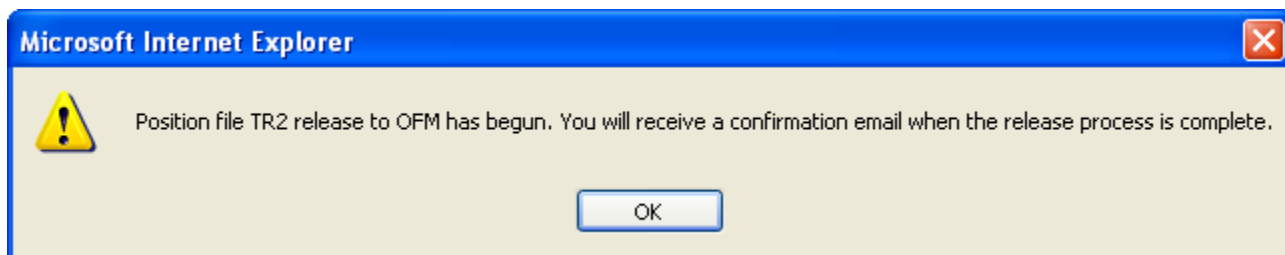
2.   Select **Ok**.

3.   If there are critical errors you will receive the following message:

Microsoft Internet Explorer

There are critical errors in the file being submitted. Please correct the errors and submit the file again.

Click OK to view the report.

[OK]   [Cancel]
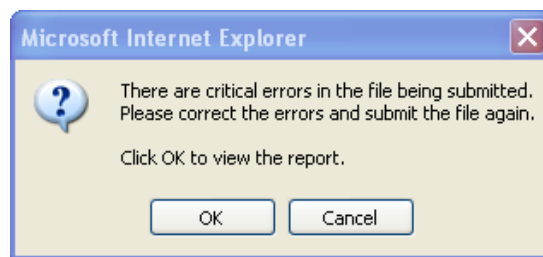
4.   Select OK and it will bring up the Salary Projection System: Edit Report.

5.   Once critical errors have been corrected, repeat steps 1 and 2 above.

6.   Once the release is complete you will receive an e-mail similar to the following:

   "Agency 105 has successfully submitted their SPS position file to OFM for
   inclusion in the compensation data collection process for 2011-13."

7.   You can then go back to the **Release**/**CIM Position Listing** report tab to view the details of the file that was released to CIM.

& *Note: This will display the salary applicable for that position at the beginning of the biennium for which you are releasing (it ages the positions by applying any applicable increment/merit increases and general salary increases). It will also have a column that says if the position was released or not. This is the only place currently that your released CIM information can be viewed. You cannot otherwise access this file to do other work on it in SPS ie change information or run projections.*
& *Note: The release will send all valid records that do not end before the start of the ensuing biennium to the CIM database.* & *Note: This report will display the last released information, so if you have released more than once, the released information based on the first release will be gone from the CIM Position Listing report.*

Congratulations. You have completed a Salary Projection Using SPS!!!!

Appendix 1 – Business Rules & Usage Notes

General/System Wide

1. The SPS application does not support the use of internet browser navigation buttons, i.e. 'back arrow' and 'forward arrow'. You should avoid using the back arrow and forward arrow buttons available on your web browser tool bar when working in SPS. Using these buttons will give unpredictable results depending on the screen you are on when used.
2. The Contact link tells how to contact the help staff, and the Help link takes you to BudgetWorks Help document library.
3. It is extremely important to properly logout of the system when not in use. There is a timeout provision included in the system. If your session is inactive for 120 minutes the system will time you out.

Prepare Position File

4. If your agency does not have any position files previously established, there will be no records displayed in the Position File List for your agency.
5. A Budget Operations Lock prohibits all agency Edit Access users from making changes to the position file. File Owners that are Edit Access may also set an Owner lock that will prohibit all Edit Access users who are not the file owner from making changes to a position file. No file that has a lock set can be deleted.
6. There are four tabs on the Filter each criteria field will display a tool tip with a formatting rule, if one applies. Some criteria fields have lookups available and others are only available to type in the criteria.
   - The Position tab allows you to filter by specific position detail information
   - The Account tab allows you to filter by specific account coding elements
   - The Summary tab displays summarized information on the number of records that will be affected by the filter chosen (when a specific position file is not chosen, this information will not be available)
   - The Hints tab displays some of the common rules used in setting a filter and when they can be used. An example for job class and Name are below:
     - *Job Class -* **12*** *(returns all job classes that begin with 12)*
     - *Job Class -* **120?1** *(returns all job classes where the first three-characters are 120 and the last character is 1 regardless of what the fourth-character is)*
     - *Job Class -* **=** *(returns all job classes where the job class code is blank)*
     - *Job Class -* **12000-12040** *(returns all job classes within the range of 12000-12040)*
     - *Job Class -* **12010, 12020, 12030** *(returns all job classes matching 12010, 12020, or 12030*
     - Name - **> B** (returns all records where the name is greater than the letter "b". < and <> are also allowed)
     - Name - **Ove*** (returns all records where the name as displayed begins with "ove". By default HR data loads Last Name, First Name. The only option to search on name is to enter the first part of the name as displayed and enter * at the end. Spaces and commas are not allowed).
7. The filter can search on a number of options (e.g., Program and Job Class) as long as the selections do not get too complex.
8. Programs listed are programs found in the AFRS funding titles for the funding titles biennium chosen. If you choose to go to a lower level of detail, you must first select the 1st level of the hierarchy (ie Program) and it will then display the next level (ie Sub Program) and down through the hierarchical relationship.
9. If a filter was applied prior to a copy/merge, the dialog box will display the filter chosen.
10. If the file in the Copy/Merge To section is empty, only the copy button will be available, if the file in the Copy/Merge To section has records, the Merge Options will be enabled and the copy button will display as Merge.
11. There are three Merge Options 1) Replace Duplicates overwrites any duplicates found in the To file, 2) Keep Duplicates retains any duplicates found in the To file, ignores those in the from file, and 3) Replace Entire File takes all the information from the From file and puts it in the To file.

12. Duplicate means the same position number, person name and start date.

Edit Your Position File

13. Filtering may return an empty list for invalid or valid positions.
14. You can filter on any combination of account code or available position options (i.e., all Secretary Admin with a position start date greater than 7/1/2003 in program 010 with appropriation index 011).
15. Vacant positions are always loaded as exception records since certain data elements are missing.
16. Only classified positions will list an increment date. All other positions are exempt from the State Salary Schedule and do not receive increments. **Review Date** will be available in this case.
17. Rules for entering an increment date: The State Salary Schedule identifies how many months until the next increment is due. Some job classifications have longer increment periods. In general: Positions at the last step must have an increment date in the past. Positions at step A should have an increment 6 months after the start date. All other steps (excluding the last step) should have yearly increments. The increment date must be later than the start date and the salary update date unless the position is at the last step.
18. Do not use the multiplier feature during your CIM release, each position must be created separately.
19. Updated Salary Date is important because it triggers the projection engine to decide whether or not to apply general salary increases and targeted job class salary range changes. It assumes that as of that date, the salary amount is correct.
20. When a position contains a job class that is associated with I-732, the system will automatically flag the I-732 Indicator; however, newly added positions will not be flagged automatically.
21. The funding percent must equal 100%.
22. The only required account codes from the funding grid are Pgm Index (Program Index) and EA Index (Expenditure Authority Index.)
23. The start date tab will change to the date you put in the start date once the position detail is saved successfully.
24. The Working Title field will be what is displayed on the position list as well as the Position Listing Report and must be added or updated manually by user.
25. The Overtime field on the Position Detail screen can be used when overtime is assumed to be consistent across all months of the biennium.
26. Once information is entered in the Variable OT grid an asterisk will display.
27. Fund coding changes can be selected by typing in partially/fully or using the down arrow key on your keyboard.
28. Changes can be effective for all projections. If you need to show an ending point for a projection and a beginning point for a different projection, you will need to end the current position and add a new start date for that position by using the **Copy to new effective date** option.
29. Copy to New Effective Date is used when changes will affect the salary projection results. It assumes the change is for the same person in the same position. A common use would be to record a future in-training promotion. Other edit options exist for adding new positions and employees. You also have the option of simply changing the original record if there is no reason to associate a change with a particular date.
30. Currently you must leave the position detail screen and return to it to see the end date populated.
31. You can also add from the **Position Listing** screen but the **Copy to New Effective Date and Copy to New Position** will not be available.
32. If the position is at the last step, increment date must be in the past.
33. You cannot change SubObject in the funding grid; you must select SubObject from the dropdown list box above the grid. This SubObject will be used for all lines of the funding.
34. The **Search** brings up all valid and invalid positions.
35. Note: There are two rules in regard to funding:
    - The first is funding proration for a position must add up to 100% or you will not be able to save the record.
    - Both program index and expenditure authority index are required for each funding line in order to save. If a line is left blank you will not be able to save because these fields are required. Delete unnecessary rows.

36. The Make Position File Current option will update all positions with a valid salary range to apply any received increments or General Salary Increase increases since the salary was last updated. This step does not have an effect when the position file is already current.
37. Basic rules for the bulk update:
    * Program Index – You must be filtered on a single program index to bulk update program index.
    * Expenditure Authority Index – You must be filtered on a single expenditure authority index to bulk update expenditure authority index.
    * Organization Index – You must be filtered on a single organization index to bulk update organization index.
    * Pay Scale – You must be filtered on a single job class to update pay scale.
    * Job Class – You must be filtered on a single job class to bulk update job class. A pay scale must be selected to provide a list of job classes. The bulk update will also update the pay scale.
    * Current Salary – You may multiply or divide to update the Current Salary. To increase salaries by 3.2%, select Multiply and enter 1.032. Only positions that do not have a salary range will be updated.
    * Position Funded – Any filter combination can be used to Bulk Update the Position Funded flag (e.g., filter on name =, to update all positions with a blank name to Position Funded, No).
    * Bargaining unit – Any filter combination can be used to Bulk Update bargaining unit (e.g., Filter on a job class with an organization index to update to a specific bargaining unit).
    * Backfill Indicator – Used to indicate positions that require coverage in the case of leave. Any filter combination can be used to Bulk Update Backfill Indicator (e.g., Filter on a job class within a program index to update positions that require backfill).
    * You can mix and match any of the fields for multiple updates at one time (e.g., update job class and backfill indicator or update organization index and bargaining unit).
38. The position filter will be updated to the updated job class. If positions had already existed with this job class these will also display if you go to the position list.
39. If the updated job class had a different salary range, all positions would have received this salary range and the salary would have been updated to that salary range given the positions' current step.
40. Positions that have ended with a date prior to today will not be updated in a bulk update.
41. You can only update for program index, organization index, or expenditure authority index when the index is filtered to a single value. Funding options will not be available for selection when this is not true. However, you may update all of program index, organization index, and appropriation index by filtering on one selection in each.
42. Use * 1.02 to increase salary by 2% in the bulk update for non-classified positions.
43. Export/Assignment Pay is only available for Washington State Patrol at this time. See Appendix 4 – Export/Import Records to Update Assignment Pay (Washington State Patrol Only).
44. The **Save as Type** must be text for an export.
45. Once the file is exported it is marked as funding and the file cannot be updated. Users with Budget Operations access may set the **Exported** flag to None by going through Update on the Position File List.
46. Setting data with leading zeros to text in the import wizard is critical so that data does not lose leading zeros once imported into Excel. For example, without this step, Fund 001 will be imported as Fund 1. There is a short cut of holding down the Shift key to highlight selected columns plus all columns in between.
47. Please study the below chart for data rules and examples for the funding export/import:

Header	Datatype	Example	Imported?	Import Validation
agency*	char(3)	105	No	1. Required 2. Must match file
position_group_id*	char(3)	010	No	1. Required 2. Must match file
person_name	varchar(30)	Doe, John	No	N/A
job_class_ttl	char(16)	COM VEH ENF OF 2	No	N/A
position_num*	char(8)	0186	No	1. Required 2. Must match with exported position

position_start_dt*	datetime	01/01/2005	No	1. (Required) Must be a valid datetime (tier 1) 2. Must match with exported position
person_id*	int	12345	No	1. (Required) Must be a valid int (tier 1) 2. Must match with exported position
payroll_org	char(6)	123456	No	N/A
user_defined	char(5)	12345	No	N/A
subsubobject	char(4)	1234	Yes	1. If used, must meet length and allowable character rules
master_index	char(8)	12345678	Yes	1. If used, must meet length and allowable character rules
ea_index	char(3)	030	Yes	1. if used, must meet length and allowable character rules
program_index	char(5)	00150	Yes	If used, must meet length and allowable character rules
organization_index	char(4)	2400	Yes	1. If used, must meet length and allowable character rules
project	char(4)	EXY1	Yes	1. If used, must meet length and allowable character rules
subproject	char(2)	01	Yes	1. Must not be used if project is not used. 2. If used, must meet length and allowable character rules
project_phase	char(2)	01	Yes	1. Must not be used if project or subproject is not used. 2. If used, must meet length and allowable character rules
budget_unit	char(3)	G75	Yes	1. If used, must meet length and allowable character rules
allocation_code	char(4)	9999	Yes	1. If used, must meet length and allowable character rules
proration_pct	numeric(4,1)	100.0	Yes	1.If used, must be a valid numeric(4,1) (tier 1)
Note: all validation is tier 2 except where noted.				

48.   Position reports will only be enabled under Position on the Application tab bar, Projection reports will only be enabled under Projections on the Application tab bar.
49.   There are three format options: "View as PDF" is designed for printing; "View as HTML" is available for quick navigation to a position and for export, but column titles may overlap; "HTML formatted for Export" is designed for exporting nicely, column titles were shortened to accomplish this.
50.   You will only be able to run one report at a time; previously generated reports will be overwritten by the new parameter selections.

51.   When an HTML format option is chosen, the ![icon] icon will present options for exporting the report as a Crystal Report, Adobe Acrobat (PDF), Excel, Word or Rich Text Format (RTF). You could export the report and attach to an e-mail to facilitate sharing results for validation.

Run a Projection

52.   Projection Parameter selections are:
   • Include increments/merit increases will apply step increases to classified employees;
   • Include General Salary Increase (GSI) will look to see if a GSI adjustment has been indicated for the projection period by the SPS administrator and apply the increase;

- Include 6767/salary survey will check for changes in the Job Class schedule for salary range in the projection period and calculate the salary using any new salary ranges found;
- Include only positions marked "Funded" in projection results will exclude any positions that are not checked funded.

53. The display of the dropdown list box for Fiscal Month options is FM – Name (i.e., 14 – September is September of the second fiscal year). Picking a fiscal month other than 01-July will create zero amounts in preceding fiscal months.

54. Projection Result selections are:
   - View results as a report will create an Allotment Summary report without first saving the projection data. You will have an option of saving the projection data once the report is displayed.
   - Save results then view as a report will ask you to enter a file ID and title to save the projection results prior to running the Allotment Summary report.
   - Save results will ask you to enter a file ID and title to save the projection results, but no report will be produced. Since the file is saved, you can still run any of the reports available for the projection file from the reporting option.

55. The Projection Files are independent of the Position Files. You can enter any ID including the same ID as used for the Position File for the indicated biennium (step 3 above). The system will automatically default to the chosen position file ID and Title. 📖 *Note: If the ID has already been used for the selected Projection Period, and you have the authority to delete a projection file, you are given the opportunity to OVERWRITE the existing (be aware that the previous projection file will be deleted before the new one with the same Projection File ID is created).*

56. The parameters selected to run the projection are saved with the Projection file and are available in the Projection File list (reviewed in Lesson 3, task 2) as well as displayed on reports. You may choose to use the comments to enter information not otherwise captured.

57. By default the 6767/Salary Survey parameter is always included, so the projection file list will always show this as checked.

58. Each sort option will create a report with sorting and subtotals as chosen. All summary reports will be subtotaled on Appropriation Index within the selected group. SPS groups Appropriation Index based on the first two characters when defined with the same fund and appropriation type, so that related Appropriation Indexes (i.e., 011 and 012, both fund 001 and appropriation type 1) will be displayed on the same page.

59. The filter allows a search on last name only. This can be a partial or full last name. The filter does not allow commas or spaces. By entering the "*" the filter will look for all names that match the letters entered here.

60. The Allotment Detail report will show all details for each combination of position number, person, and fund code.

61. The Allotment Detail report will allow you to investigate anomalies in your Allotment Summary at the detail level. It is recommended that you do not print an Allotment Detail report for your entire agency. The details of the projection are saved in SPS with the projection file and can be reported on any time producing the same results as the initial report.

62. You will need to filter your report down to 3,000 records in order to run the allotment detail report.

Data Release for Compensation Impact Model (CIM)

63. Do not use the biennium for which you are submitting the data because the titles will not yet exist in AFRS and will make all of your positions invalid. For example, you will need to use the 2019-21 Funding Titles Biennium when creating your 2021-23 CIM file.

64. Do not use the multiplier feature on the position detail screen during your CIM release, each position must be created separately.

65. The Salary Projection System: Edit Report will provide you with Critical errors (these must be fixed) and Warning errors to evaluate whether or not you need to go back and fix these to include in your release. If the warnings are not fixed, those positions will not be included in your released information. This report is run unfiltered, regardless if a filter is set or not.

66. The release will send all valid records that do not end before the start of the ensuing biennium to the CIM database.
67. The CIM Position Listing report will display the last released information, so if you have released more than once, the released information based on the first release will be gone from the CIM Position Listing report.

Appendix 2 – Data Exception Errors (Invalid Records)

1. "Code" does not exist in titles tables (many variations exist)
   > User Ed - Funding code titles must exist in the AFRS titles for the biennium associated with the position file. Please change your codes in SPS or add the code to AFRS. Once codes are entered into AFRS they will appear in SPS immediately.

2. Subobject is not valid for salary projection
   > User Ed - Salary subobject must exist as a Valid Salary SubObject
   >
   > | AA | AB | AC | AD | AE | AF | AG | AH | AJ | AK | AL | AM |
   > | AN | AQ | AR | AS | AT | AU | NW | NZ |
   >
   > Change the subobject on these records to one of the valid options.

3. Position salary range is not valid for this job class per the Job Class table
   > User Ed: A salary range must match either the salary range or special salary range from the job class table unless the position is Y-rated. Either correct the salary range to match the job class range or enter a generic job class code "blank" in job class code for a blank salary range.

4. Appointment salary does not match the salary in the State Salary Schedule
   > User Ed: The salary must match the state salary schedule for the indicated salary range and step unless the position is Y rated. Either correct the salary to match the state salary schedule by reselecting the range and step on position detail, enter "Y" on the **Pay Code** of the **More Detail** screen, or enter a generic job class code of "blank".

5. Salary exceeds band
   > User Ed: The salary on the position is outside of the band limits as identified in SPS. Check "Salary May Exceed Band" on the Position Detail to override the limit.

6. No valid pay scale identified
   A valid Pay Scale is required in SPS.

7. Job Class does not exist in Job Class table
   User Ed: All positions require a valid job class for the indicated Pay Scale. Contact the OFM Help Desk at HereToHelp@ofm.wa.gov or call 360.407.9100 if a valid job class is not available.

8. Increment date must be greater than Update Date
   User Ed: Classified positions not at the last step require an Increment Date that is greater than the Position Start Date or Update Date in order to accurately calculate increments due.

9. Increment date does not match increment data rules
   User Ed: The State Salary Schedule identifies how many months until the next increment is due. Change the increment date to match the requirements. Positions at the last step must have an increment date in the past but not older than 1/1/1951. Positions at step A should have an increment 6 months after the start date. All other steps (excluding the last step) should have yearly increments. The increment date must be later than the start date and the salary update date unless the position is at the last step.

10. Proration Percent of funding lines must = 100%
    User Ed: Proration percent of funding lines must = 100%. Adjust the funding lines to equal 100%.

11. Part time % must be greater than 0
    User Ed: A part-time percent of zero will result in no salary or FTE projection for the position. Change the part-time percent or variable part-time of the position to be greater than zero.

12. Each position funding line must contain at least a program index and expenditure authority index.
    User Ed: In order to make a position valid you must choose at least one of the coding elements for both program index and expenditure authority index.

13. Funding lines do not exist for this position
    User Ed: Without funding lines this position cannot be projected. Create funding lines with proration percentages equal to 100%.

14. Position start date is invalid
    User Ed: A position may load from HRMS into SPS without a start date. In order to make this position valid a start date must be entered by using copy to new effective date.

15. Position salary range is not valid for this job class per the State Patrol Salary Range table
    User Ed: State Patrol has a special table for salary range. A position must be on this table to be valid.

Appendix 3 – Release Notes

General

1. In testing we have found occurrences of errors that say "Unhandled Exception" or "Timed Out". If you receive one of these errors, log out of both SPS and BudgetWorks. Log back into BudgetWorks, open SPS, and try again. The error should be cleared. If the error persists, contact the OFM Help Desk at HereToHelp@ofm.wa.gov or call 360.407.9100 immediately. You will be asked the steps you took including what screen you were on and what screen you were trying to get to when the error occurred.

Position File List

1. When adding a new file, you will need to scroll down to find it on the list. In all other cases when working with an existing file, the screen will position back to the file or position you were working with.

2. If you choose to display your text size through your internet toolbar option for larger or largest, you may have to scroll to the right to see all the functional tabs available.

Position Detail

1. The Job Class Risk classification is displayed. The Risk Classification <u>rate</u> is being applied to projections per the Job Class Table in SPS.

2. You will not be able to save a record with blank funding rows. Before saving be sure to delete unnecessary rows.

3. Rules for entering an increment date: The State Salary Schedule identifies how many months until the next increment is due. Some job classifications have longer increment periods. In general: Positions at the last step must have an increment date in the past. Positions at step A should have an increment 6 months after the start date. All other steps (excluding the last step) should have yearly increments. The increment date must be later than the start date and the salary update date unless the position is at the last step.

4. Updated Salary Date is important because it triggers the projection engine to decide whether or not to apply general salary increases and merit system increases. It assumes that as of that date, the salary amount is correct.

5. When performing a copy to new effective date, you must leave the position detail screen and return to it to see the end date populated for the previous start date.

6. When the Job Class is changed, the Working Title is not updated at the same time and must be added or updated manually by the user.

7. Once the file is exported it is marked as exported (funding or assignment pay) and cannot be updated. Users with Budget Operations access or the user that created the file may uncheck the **Exported Funding or Assignment Pay** flag through the update function.

Projections

1. Projections for dates prior to the day run may not accurately reflect step changes.

2. When you run a projection and ask to save results, the system automatically assigns the position file ID and title to the projection file. Comments are not automatically moved over; however, if you want the

same comments, you can select the reset button and it will display the comments associated with the position file, then select save.

3. Occasionally, a Run Projection failed! message will display when a projection file with the same ID already exists. Try to run projection again as this is an intermittent anomaly.

Filter

1. Using an = to signify a blank does not work in the user defined or start date criteria.

2. Start date must be expressed as a range even if you want to filter on only one date.

3. The filter must be used to reduce records down to 3,000 when running an allotment detail report.

4. When filtering on the user defined field, the filter may return "blank" user defined records if they previously had information and you deleted that information. It is counting the blanks as matching the filter.

5. Once a filter is set, even if you delete the information or choose the reset button from the Filter dialog box, the position listing will still show as a filter being applied. To remove this indicator you must choose the Filter/clear filter tab.

Appendix 4 – Export/Import Records to Update Assignment Pay (Washington State Patrol Only)

SPS allows users to export position data, update assignment pay information, and import it back into SPS to ensure accurate assignment pay information by position. This will allow agencies that use specific wage types for assignment pay to update records outside of SPS and to have the updates reflected in SPS for CIM. Updates outside of SPS are most likely to happen in Excel, but can happen in any system as long as a tab-delimited .txt file is imported. Note: this option is only available for Washington State Patrol (WSP) at this time.

📖 *Note: Prior to updating Assignment Pay, you should make sure the correct job class, range and step are assigned to the position. Once the file is exported and adjustments are made the position will be edited upon import to make sure the job class, range and step align with the assignment pay indicated on the imported file. If they do not match, the position will be invalid.*

1. Select the position file to export and the **Export/Assignment Pay** tab.

8.   The following Export Data dialog box will display, select the **Export Data** button.
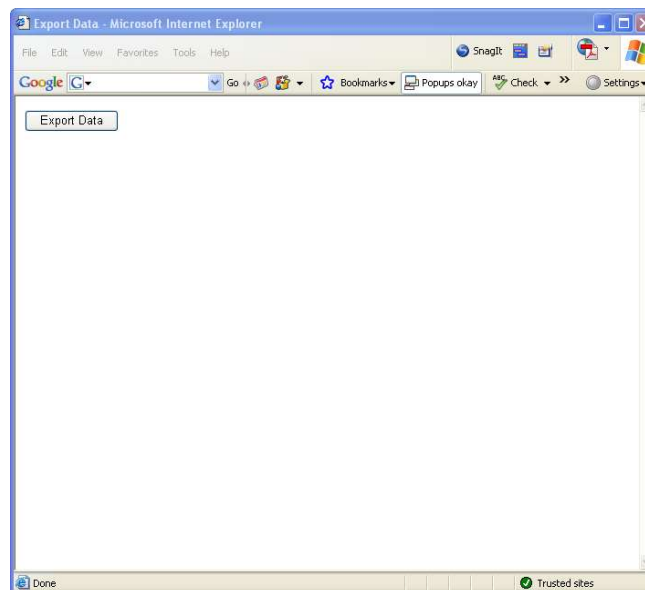
3. The following File Download dialog box will display. Select **Save**.
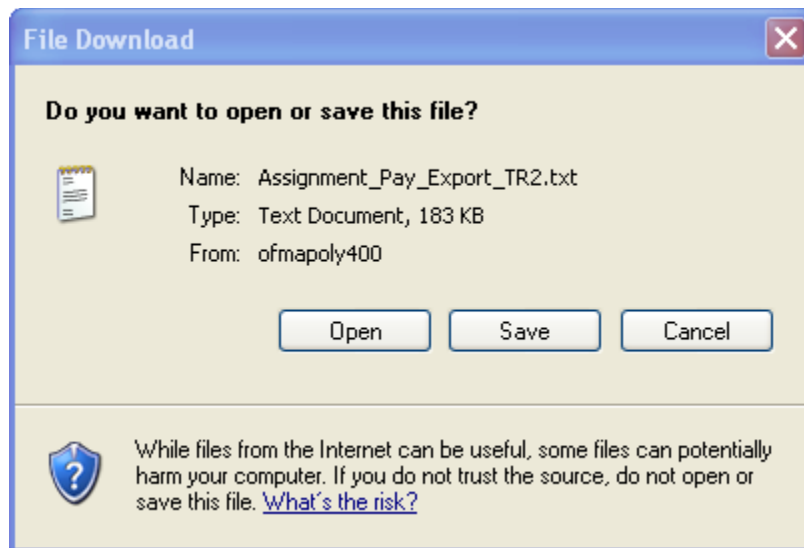
4. Use the Save As dialog box to select the location and name for saving the exported file and select **Save**.
   📖 *Note: The **Save as Type** must be text.*
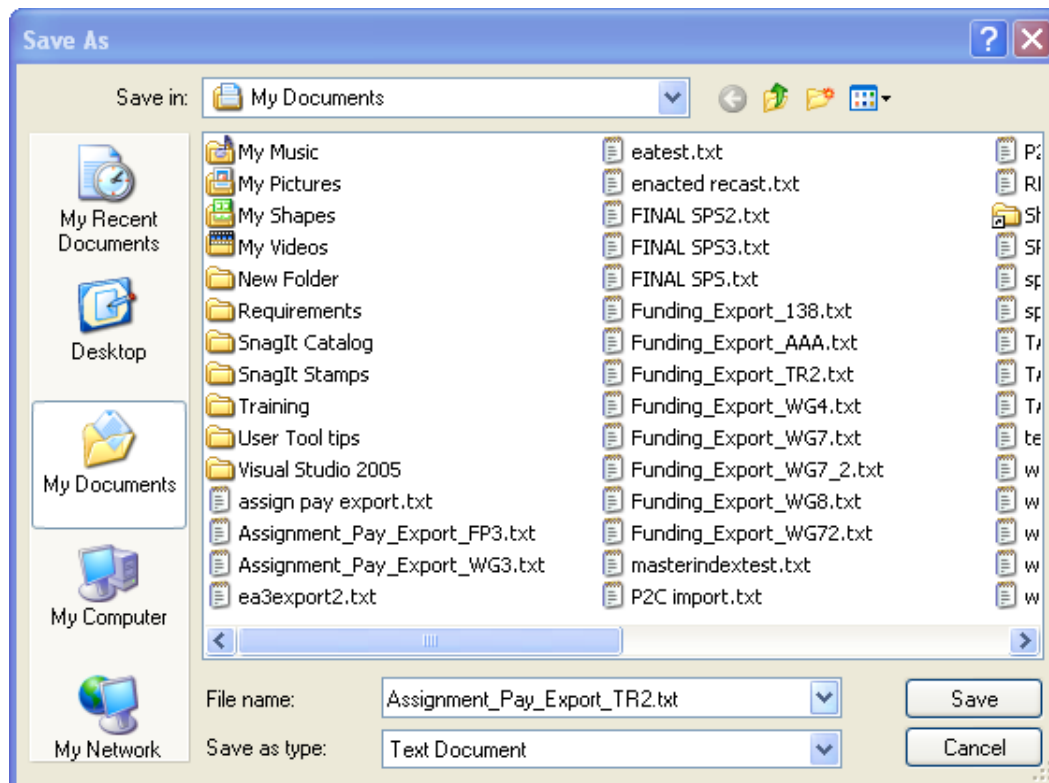
5. You will receive the following message. Close the dialog box.
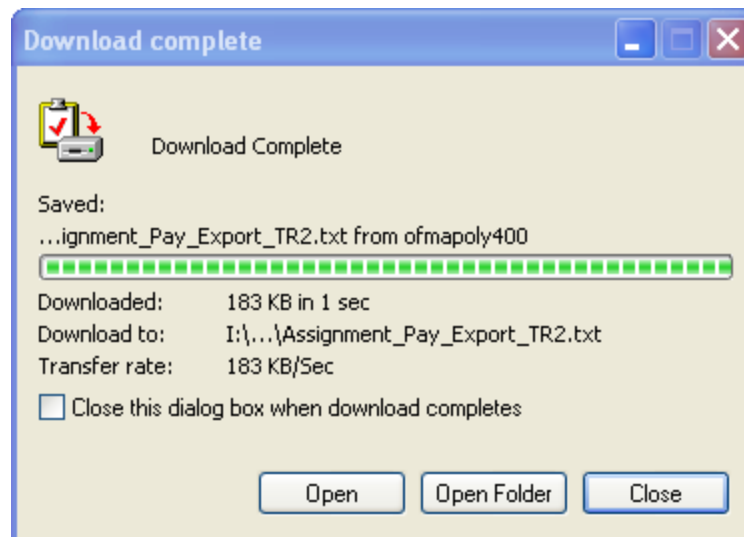
6. View the **Position File List** to make sure the Exported column says "Assignment Pay".
   📖 *Note: Once the file is exported it is marked as assignment pay and the file cannot be updated. Users with Budget Operations access may set the **Exported** flag to None by going through Update on the Position File List.*

7. Open **Excel**.

8. Select **File/Open**.

9. Change the Files of Type to **Text Files.**

10. Select the file exported in step 1.
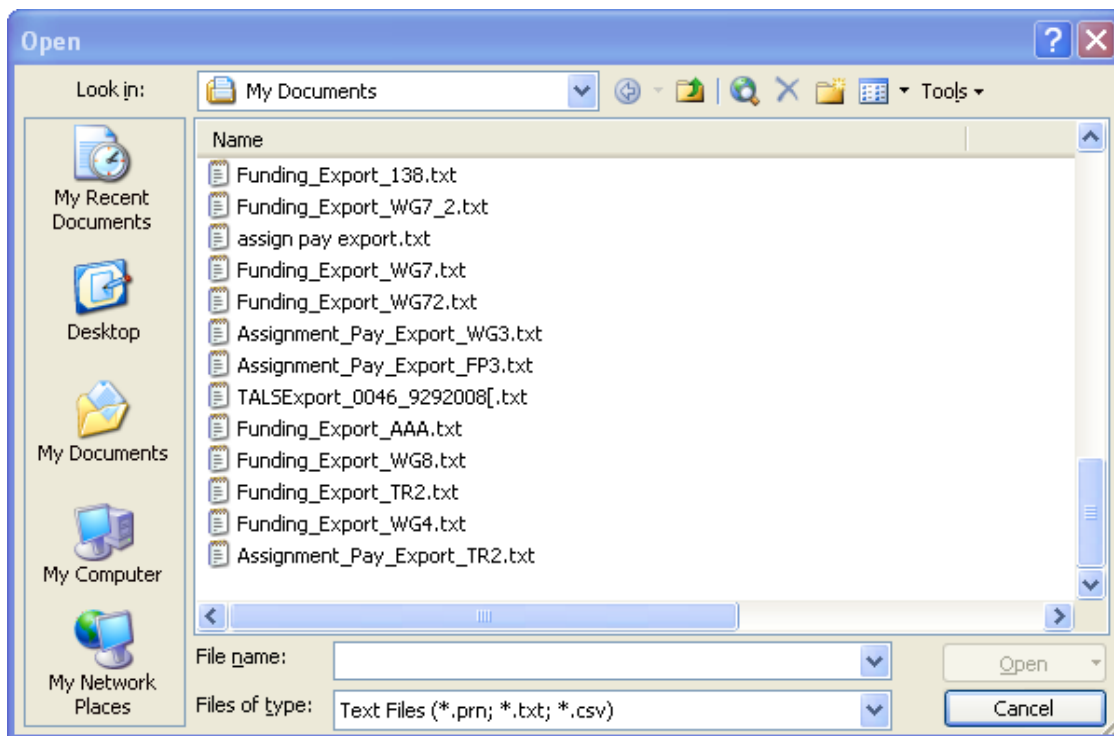
11. Select **Open** to open the Exported file. This will bring up the Text Import Wizard. Select **Original data type** as delimited, then select **Next**.

12.   Check to select the **Tab** under the **Delimiters** option, then select **Next**.

For each column that has data that begins with a zero, click the column then select **Text** under **Column data format**. ⬛ *Note: This step is critical so that data does not lose leading zeros once imported into Excel. For example, without this step, Fund 001 will be imported as Fund 1. There is a short cut of holding down the Shift key to highlight selected columns plus all columns in between.*
Agency
Position Number
Person ID

13. Select **Finish** once all required columns are marked as **Text** to open the file.

14. With the opened file you can change wage type elements on a position. Rows that were exported must be included in the import file. The import file cannot contain rows that were not exported. 📖 *Note: Please study the below chart for data rules and examples.*
<mark>Skip assignment pay updates in training</mark>

Header	Datatype	Example	Imported?	Import Validation
Agency*	char(3)	105	No	1. Required 2. Must match file
PositionGroup*	char(3)	10	No	1. Required 2. Must match file
Name	varchar(30)	Doe, John	No	N/A
JobClass	char(16)	COM VEH ENF OF 2	No	N/A
PositionNumber*	char(8)	186	No	1. Required 2. Must match with exported position
PositionStartDate*	datetime	1/1/2005	No	1. (Required) Must be a valid datetime (tier 1) 2. Must match with exported position
PersonID*	int	12345	No	1. (Required) Must be a valid int (tier 1) 2. Must match with exported position
SalaryRange	char(8)	40	No	N/A
1019 - Educ 2Yr	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1020 - WSP Armorer	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1021 - WSP Academy Instructor	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1022 - WSP Detective	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1023 - WSP SW Incident Resp Team	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1024 - WSP Trooper of the year	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1025 - WSP CTS Trooper of the yr	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1026 - WSP Canine unit Member	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1027 - WSP Motor cycle Officer	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1028 - Educ 4Yr	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1029 - WSP Bomb technician	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1030 - WSP Single Engine pilot	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1031 - WSP Canine Training Ofc	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1032 - WSP Outpost duty pay	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1033 - WSP Executive Prot Unit	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1034 - WSP Multi engine pilot	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1035 - WSP Command pilot	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1046 - VarAssn%	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1051 - WSP Snohomish Co.	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1052 - WSP Pierce Co.	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1053 - WSP King Co.	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1605 - WSP Assignment Pay 3.0%	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1650 - WSP FTOP Trooper 10%	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)
1651 - WSP FTOP Sgt./Lt. 5%	varchar(1)	Y or Blank	Yes	1. Must Be a Y or Blank (tier 1)

Note: all validation is tier 2 except where noted.

15.   Select **Save As** to save the file.

16.   Reselect the exported file name and select **Save.**

17.   Select **Yes** to replace the existing file.
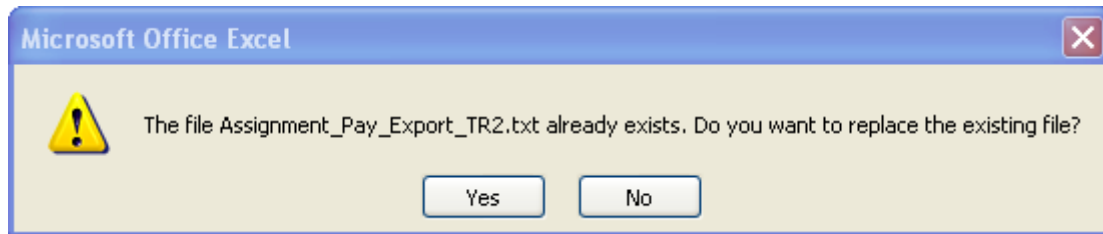
18.   Select **Yes** to the notice that you are saving a text file.
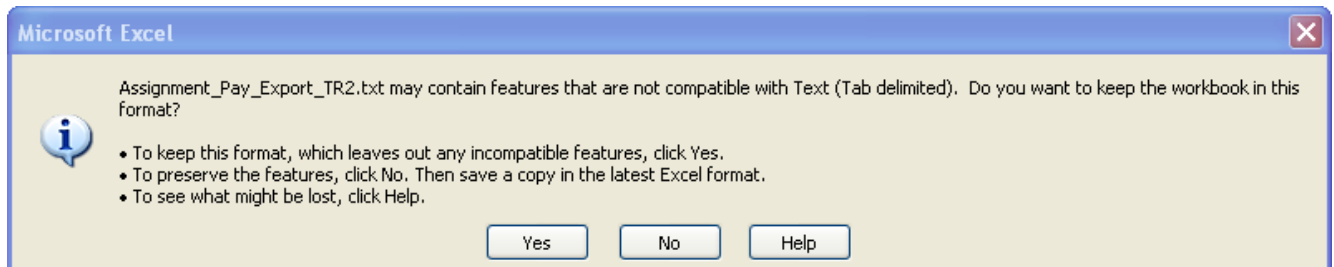
19.   Go back to SPS to the **Position File List** screen.

20.   Select the position file that was originally exported and the **Import/Assignment Pay** tab.

21.   Browse for the exported file from the Import Assignment Pay dialog box.
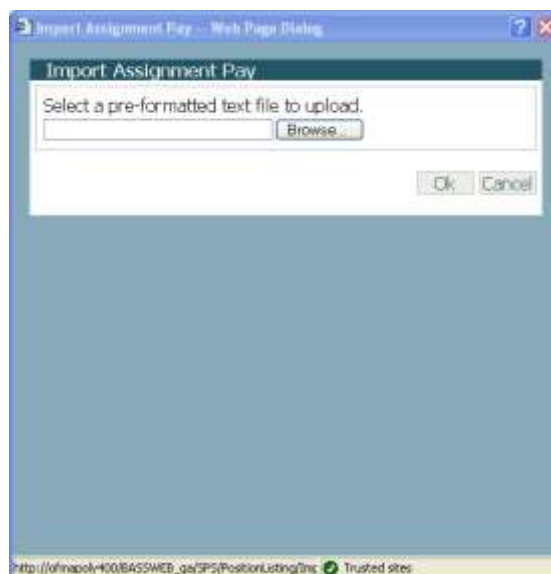
22.   Select the file to import and select **Open.**
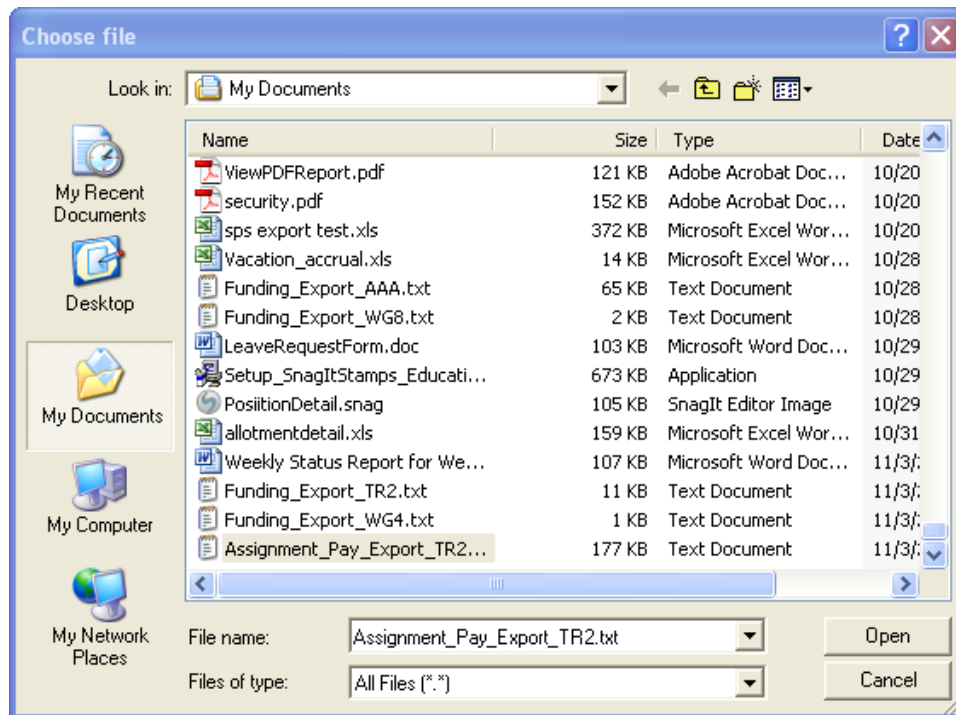
23. Verify the file was filled in correctly in the Import Funding dialog box and select **Ok**.
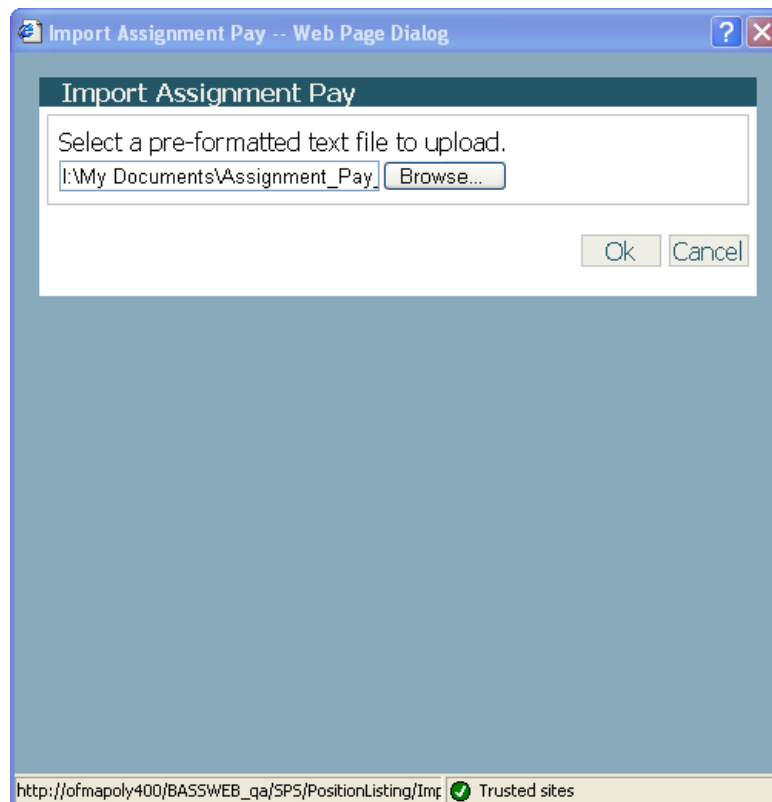
24. If there are errors, you will receive an Assignment Pay Import Error Report that you can Print to recall how to fix the errors.

Assignment Pay Import Error Report -- Web Page Dialog

Assignment Pay Import Error Report

SPS: Assignment Pay Import Error Report

Agency   225-Patrol, Wash State
Date & Time   11/3/2008 5:59 PM

Row #	Error Description
-1	Position removed that was in export. PositionNumber: 70083157, PersonID: 104861, PositionStartDate: 12/20/1985
-1	Position removed that was in export. PositionNumber: 70083670, PersonID: 108775, PositionStartDate: 3/16/2004
-1	Position removed that was in export. PositionNumber: 70093284, PersonID: 105948, PositionStartDate: 7/31/1996

Print   Cancel

http://ofmapoly400/BASSWEB_qa/SPS/PositionListing/ResultLog.aspx?type=a   Trusted sites

25.   Once errors have been corrected repeat steps 1-23.

26.   Once everything has been corrected and is in the correct format you will receive the following message.

Microsoft Internet Explorer

File uploaded successfully.

OK

27.   Select **OK** and you will return back to the position file list screen

Appendix 5 – Report Samples

1. Position Listing Report by Position Number. You can also sort by:
   - Program Index, Position Number
   - Name, Program Index, Position Number

Salary Projection System
Position Listing Report

SPS00

Position File: TIt2 Trainer - Corp To File
Agency: 103 Community, Trade & Economic Develop
Filter Selection: No filter applied
Sort By: Position Number

Pos #	Name	Job Class	Title	Sal Range	Step	Total Salary	% FT	Start Date	End Date	Increment/ Review Date	PRO %	PI	OI	EAI	Sub Obj	Proj	Sub Proj	Proj Phase	Budgeting Unit RDO NUMBER	Work County	Funded/ Invalid
70004395	Vacant-New Hire	542W	EN FAC SITE SPSC	60	D	4,653.00	100.0	11/16/08		11/16/09	100.0	12401		012	AA	1241	02	00	P2	Thurston	Y	N
70004410	Employee 00017	EX051	Directors Secretary			6,141.42	100.0	11/16/03		07/01/09	100.0	11200		012	AC	1120	01	00	P2	Thurston	Y	N
70004418	Employee 00023	106K	MANAGER, OFFICE	49	1	4,014.00	100.0	06/01/07	11/2008	06/21/09	100.0	13100		012	AA	1310	01	00	P2	Thurston	Y	N
70004420	Employee 00013	EMS01	EMB BAND 1			5,263.00	100.0	06/01/07		05/01/09	100.0	11100		012	AC	1110	01	00	P2	Thurston	Y	N
70004427	Employee 00008	106U	OFF ASST 3	31	L	2,789.00	100.0	03/16/08		06/19/07	100.0	13100		012	AA	1310	01	00	P3	Thurston	Y	N
70004428	Employee 00009	479J	IT SPEC 2	54	E	4,114.00	100.0	04/01/08		04/01/09	100.0	13101		012	AA	1311	01	00	P2	Thurston	Y	N
70004442	Employee 00004	191I04	HUMAN RESOURCE	54	E	4,114.00	100.0	06/16/08		06/16/09	50.0	13102		987	AA	1312	02	00	P2	Thurston	Y	N
70004442	Employee 00004	191I04	HUMAN RESOURCE	54	E	4,114.00	100.0	06/16/08		06/16/09	25.0	44101		020	AA	4405	02	00	P2	Thurston	Y	N
70004442	Employee 00004	191I04	HUMAN RESOURCE	54	E	4,114.00	100.0	06/16/08		06/16/09	25.0	47103		012	AA	4700	03	00	P2	Thurston	Y	N
70004458	Employee 00012	479M	IT SPEC 5	66	L	6,375.00	100.0	12/01/06		07/01/07	100.0	13101		012	AA	1311	01	00	P2	Thurston	Y	N
70004478	Employee 00071	114F	Procurement and	45	L	3,918.00	100.0	06/01/04		07/01/07	100.0	13100		012	AA	1310	01	00	P2	Thurston	Y	N
70004564	Employee 00046	119E	HUMAN RESOURCE	45	1	3,726.00	100.0	07/01/08		07/01/09	100.0	13102		012	AA	1312	01	00	P2	Thurston	Y	N
70004578	Employee 00022	479L	IT SPEC 4	62	L	5,958.00	100.0	02/16/03		07/01/07	100.0	13101		012	AA	1311	01	00	P2	Thurston	Y	N
70004579	Employee 00038	479M	IT SPEC 5	66	A	5,010.00	100.0	07/01/08		01/01/09	6.3	12100		012	AA	1210	01	00	P3	Thurston	Y	N
70004579	Employee 00038	479M	IT SPEC 5	66	A	5,010.00	100.0	07/01/08		01/01/09	3.5	13101		012	AA	1311	01	00	P3	Thurston	Y	N

2. Allotment Detail Report by Position Number. You can also sort by:

- Program Index, Position Number
- Position Number (one page rollup regardless of funding)
- Name, Program Index, Position Number

SPS001

Salary Projection System
Allotment Detail Report

Projection File:	516 PFML					Increments:	Yes
Agency:	163 Consolidated Technology Services					6767:	Yes
Biennium:	2017-19	Starting Fiscal Month:	01 – July			COLA:	Yes
Projection Run Date:	05/16/2019	Position File:	516 PFML			Funded:	No
Sort By:	Position Number						
Filter:	No filter applied						

Position Number:	71027130 Part Time Percent: 100.00	Job Class: OFM006 OFM Exec Mgr	Program Index:	L0120
Name:	no name listed	Range: Step:	Organization Index:	1200
Position Start Date:	04/16/2012 Termination Date:	Increment Date:	Proj/Subproj/Phase:	ITMO//
Pay Code:	S Retirement Plan: P2 PERS Plan 2	Fund-AT: 458-1 Consolidated Tech Serv Revol	Budget Unit:	

Expenditure Authority Index: 070 CTS Services (OCIO - Appropriated)   Proration Percent: 100.00

Fiscal Year 2018	July	August	September	October	November	December	January	February	March	April	May	June	Total
Staff Months	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	12.00
AC State Exempt	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	154,524.00
Salary Total	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	12,877.00	154,524.00
BA OASI	798.37	798.37	798.37	701.03	0.00	0.00	128.77	128.77	128.77	128.77	128.77	128.77	3,868.76
BB Retirement	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	1,612.20	19,346.40
BC Medical	43.98	43.98	43.98	43.98	43.98	43.98	39.58	39.58	39.58	39.58	39.58	39.58	501.36
BD Health	913.00	913.00	913.00	913.00	913.00	913.00	913.00	913.00	913.00	913.00	913.00	913.00	10,956.00
BH Medicare	257.54	257.54	257.54	257.54	257.54	257.54	257.54	257.54	257.54	257.54	257.54	257.54	3,090.48
BK PFML	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Benefits Total	3,625.09	3,625.09	3,625.09	3,527.75	2,826.72	2,826.72	2,951.09	2,951.09	2,951.09	2,951.09	2,951.09	2,951.09	37,763.00
Total Salary + Benefits	16,502.09	16,502.09	16,502.09	16,404.75	15,703.72	15,703.72	15,828.09	15,828.09	15,828.09	15,828.09	15,828.09	15,828.09	192,287.00

3. Allotment Summary Report by Program. You can also sort by:

- Program, Subprogram
- Program Index
- Division
- Org Index
- Account, EA Type by Agency
- Account, EA Type by Program
- Project

SPS002

Salary Projection System
Allotment Summary Report

Page 1 of 11
5/16/2019
2:20:45PM

Projection File:	516 PFML			Increments:	Yes
Agency:	163 Consolidated Technology Services			6767:	Yes
Biennium:	2017-19	StartingFiscalMonth:	01 - July	COLA:	Yes
ProjectionRunDate:	05/16/2019	Position File:	516 PFML	Funded:	No
Filter:	No filter applied				
Sort By:	Program				

Program: 040 Computer Services Div. (CSD)
Expenditure Authority Index: 963 CTS Services (Non-Appropriated)

Fiscal Year 2018	July	August	September	October	November	December	January	February	March	April	May	June	Total
Staff Months	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	156.00
AC State Exempt	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	1,193,304
Salary Total	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	1,193,304
BA OASI	6,165	6,165	6,165	6,165	6,165	6,165	994	994	994	994	994	994	42,954
BB Retirement	12,236	12,236	12,236	12,236	12,236	12,236	12,236	12,236	12,236	12,236	12,236	12,236	146,832
BC Medical	560	560	560	560	560	560	509	509	509	509	509	509	6,414
BD Health	11,869	11,869	11,869	11,869	11,869	11,869	11,869	11,869	11,869	11,869	11,869	11,869	142,428
BH Medicare	1,989	1,989	1,989	1,989	1,989	1,989	1,989	1,989	1,989	1,989	1,989	1,989	23,868
BK PFML	0	0	0	0	0	0	0	0	0	0	0	0	0
Benefits Total	32,819	32,819	32,819	32,819	32,819	32,819	27,597	27,597	27,597	27,597	27,597	27,597	362,496
Total Salary + Benefits	132,261	132,261	132,261	132,261	132,261	132,261	127,039	127,039	127,039	127,039	127,039	127,039	1,555,800

Fiscal Year 2019	July	August	September	October	November	December	January	February	March	April	May	June	Total
Staff Months	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	156.00
AC State Exempt	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	1,193,304
Salary Total	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	99,442	1,193,304
BA OASI	994	994	994	994	994	994	994	994	994	994	994	994	11,928
BB Retirement	12,236	12,236	9,944	9,944	9,944	9,944	9,944	9,944	9,944	9,944	9,944	9,944	123,912
BC Medical	509	509	509	509	509	509	686	686	686	686	686	686	7,170
BD Health	13,000	13,000	13,000	13,000	13,000	13,000	13,000	13,000	13,000	13,000	13,000	13,000	156,000
BH Medicare	1,989	1,989	1,989	1,989	1,989	1,989	1,989	1,989	1,989	1,989	1,989	1,989	23,868
BK PFML	0	0	0	0	0	0	2,983	2,983	2,983	2,983	2,983	2,983	17,898
Benefits Total	28,728	28,728	26,436	26,436	26,436	26,436	29,596	29,596	29,596	29,596	29,596	29,596	340,776
Total Salary + Benefits	128,170	128,170	125,878	125,878	125,878	125,878	129,038	129,038	129,038	129,038	129,038	129,038	1,534,080

4. Allotment FTE Report by Position Number. You can also sort by:
    *   Program Index, Position Number
    *   Name, Program Index, Position Number

Salary Projection System
Allotment FTE Report

Projection File:	TR2 Trainer - Copy To File
Agency:	103 Community, Trade and Economic Develop
Biennium:	2009-11
Projection Run Date:	11/25/2008
Sort By:	Position Number
Filter:	No filter applied

Pos #	Name	Job Class	Title	PI	Start Date	FY1 Total Salary	FY2 Total Salary	Biennial Total Salary	FY1 Total Benefits	FY2 Total Benefits	Biennial Total Benefits	FY1 FTE	FY2 FTE	Average Biennial FTE
70004395	Vacant/New Hire	542W	EMGY FAC SITE SP	12401	12/16/08	58,684.20	62,890.40	121,574.60	16,379.08	17,050.34	33,429.42	1.00	1.00	1.00
70004410	Employee 00017	E3005	CONF. SECRETARY	11280	12/10/03	77,744.26	79,299.19	157,043.35	19,420.96	19,669.19	39,090.15	1.04	1.04	1.04
70004420	Employee 00013	EM501	EMS BAND 1	11160	06/01/07	64,208.60	65,492.82	129,701.42	17,260.70	17,465.68	34,726.38	1.00	1.00	1.00
70004427	Employee 00008	100J	OPT ASST 3	13100	03/16/08	34,023.80	34,708.36	68,732.16	12,443.60	12,552.10	24,995.70	1.00	1.00	1.00
70004428	Employee 00009	475U	IT SPEC 2	13101	04/01/08	53,401.60	57,232.31	110,633.99	15,533.91	16,147.34	31,683.25	1.00	1.00	1.00
70004442	Employee 00004	191M	HUM RES CNSLT 3	13102	06/09/08	26,476.40	28,378.95	54,855.35	7,732.14	8,035.87	15,768.01	0.50	0.50	0.50
70004442	Employee 00004	191M	HUM RES CNSLT 3	84101	06/29/08	13,236.20	14,190.52	27,426.72	3,868.18	4,018.00	7,884.18	0.25	0.25	0.25
70004442	Employee 00004	191M	HUM RES CNSLT 3	47105	06/09/08	13,236.20	14,190.52	27,426.72	3,868.18	4,018.00	7,884.18	0.25	0.25	0.25
70004431	Employee 00012	475M	IT SPEC 5	13101	12/01/08	80,213.00	81,819.30	162,034.30	19,811.23	20,071.44	39,886.72	1.00	1.00	1.00
70004478	Employee 00071	114F	PROC SUPP SPEC 2	13100	06/01/04	47,709.60	48,755.62	96,555.22	14,541.88	14,794.48	29,636.36	1.00	1.00	1.00
70004364	Employee 00046	119E	HUM RES CNSLT 1	13102	07/01/08	47,799.60	48,755.62	96,555.22	14,541.88	14,794.48	29,636.36	1.00	1.00	1.00
70004578	Employee 00022	475L	IT SPEC 4	13101	02/05/03	72,687.60	74,141.32	146,828.92	18,613.94	18,845.96	37,459.90	1.00	1.00	1.00
70004579	Employee 00038	475M	IT SPEC 5	12100	07/01/08	4,151.16	4,448.58	8,599.74	1,104.60	1,151.78	2,256.18	0.08	0.08	0.08
70004579	Employee 00038	475M	IT SPEC 5	13101	07/01/08	2,306.22	2,471.42	4,777.64	613.64	639.96	1,253.60	0.04	0.04	0.04
70004579	Employee 00038	475M	IT SPEC 5	77100	07/01/08	59,634.10	63,692.88	123,326.98	15,811.36	16,691.08	32,502.44	0.90	0.90	0.90
70004610	Employee 00053	123F	HM RES CNST A5 2	13102	07/01/08	41,199.40	44,163.76	85,363.16	13,588.48	14,061.64	27,650.12	1.00	1.00	1.00
70004666	Employee 00068	197M	COMM CONSULT 8	11180	05/16/07	70,480.70	72,337.02	142,817.72	18,261.68	18,558.04	36,819.72	1.00	1.00	1.00
70004677	Employee 00015	475M	IT SPEC 5	13100	01/01/06	72,705.64	77,912.02	150,617.66	18,618.80	19,467.76	38,064.56	1.00	1.00	1.00
70004696	Employee 00081	WA8003	WMS BAND 3	13101	07/01/07	101,662.80	103,695.82	205,358.62	23,238.84	23,521.03	46,759.87	1.00	1.00	1.00

5. Incremental Report for General Salary Increases by Program. You can also sort by:

- Program, Subprogram
- Program Index
- Division
- Org Index
- Account, EA Type by Agency
- Account, EA Type by Program
- Project

SPS005

Salary Projection System
Incremental Report for General Salary Increases

Projection File:	MP1 Projection for Megan			Increments:	Yes
Agency:	105 Office of Financial Management			6767:	Yes
Biennium:	2007-09	Starting Fiscal Month:	01 - July	COLA:	Yes
Projection Run Date:	08/15/2008	Position File:	No longer exists	Funded:	No
Filter:	No filter applied				
Sort By:	Program				

Program: 110 Statewide Systems
Expenditure Authority Index: 098

Fiscal Year 2008	July	August	September	October	November	December	January	February	March	April	May	June	Total
AA State Classified	0	0	0	0	0	0	0	0	0	0	0	0	0
AC State Exempt	0	0	0	0	0	0	0	0	0	0	0	0	0
Salary Total	0	0	0	0	0	0	0	0	0	0	0	0	0
BA OASI	0	0	0	0	0	0	0	0	0	0	0	0	0
BB Retirement	0	0	0	0	0	0	0	0	0	0	0	0	0
BH Medicare	0	0	0	0	0	0	0	0	0	0	0	0	0
Benefits Total	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Salary + Benefits	0	0	0	0	0	0	0	0	0	0	0	0	0

Fiscal Year 2009	July	August	September	October	November	December	January	February	March	April	May	June	Total
AA State Classified	0	0	454	454	454	454	454	454	460	460	460	460	4,564
AC State Exempt	0	0	303	303	303	303	303	303	303	303	303	303	3,030
Salary Total	0	0	757	757	757	757	757	757	763	763	763	763	7,594
BA OASI	0	0	47	47	47	47	47	47	47	47	47	47	470
BB Retirement	0	0	63	63	63	63	63	63	63	63	63	63	630
BH Medicare	0	0	11	11	11	11	11	11	11	11	11	11	110
Benefits Total	0	0	121	121	121	121	121	121	121	121	121	121	1,210
Total Salary + Benefits	0	0	878	878	878	878	878	878	884	884	884	884	8,804

6. Incremental Report for Merit System (PID) Increases by Program. You can also sort by:

- Program, Subprogram
- Program Index
- Division
- Org Index
- Account, EA Type by Agency
- Account, EA Type by Program
- Project

SPS005

Salary Projection System
Incremental Report for Merit System (PID) Increases

Projection File:	010 Test		Increments:	Yes
Agency:	105 Office of Financial Management		6767:	Yes
Biennium:	2017-19	Starting Fiscal Month: 01 - July	COLA:	Yes
Projection Run Date:	05/09/2019	Position File: 010 Test	Funded:	No
Filter:	No filter applied			
Sort By:	Program			

Program: 050 Statewide Accounting
Expenditure Authority Index: 130

Fiscal Year 2018	July	August	September	October	November	December	January	February	March	April	May	June	Total
AA State Classified	0	0	0	0	0	0	0	0	0	0	0	0	0
Salary Total	0	0	0	0	0	0	0	0	0	0	0	0	0
BA OASI	0	0	0	0	0	0	0	0	0	0	0	0	0
BB Retirement	0	0	0	0	0	0	0	0	0	0	0	0	0
BH Medicare	0	0	0	0	0	0	0	0	0	0	0	0	0
BK PFML	0	0	0	0	0	0	0	0	0	0	0	0	0
Benefits Total	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Salary + Benefits	0	0	0	0	0	0	0	0	0	0	0	0	0

Fiscal Year 2019	July	August	September	October	November	December	January	February	March	April	May	June	Total
AA State Classified	398	398	398	398	398	398	805	805	805	805	805	966	7,379
Salary Total	398	398	398	398	398	398	805	805	805	805	805	966	7,379
BA OASI	25	25	25	25	25	25	50	50	50	50	50	60	460
BB Retirement	51	51	51	51	51	51	103	103	103	103	103	124	945
BH Medicare	6	6	6	6	6	6	12	12	12	12	12	14	110
BK PFML	0	0	0	0	0	0	3	3	3	3	3	4	19
Benefits Total	82	82	82	82	82	82	168	168	168	168	168	202	1,534
Total Salary + Benefits	480	480	480	480	480	480	973	973	973	973	973	1,168	8,913